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Restaurant Business

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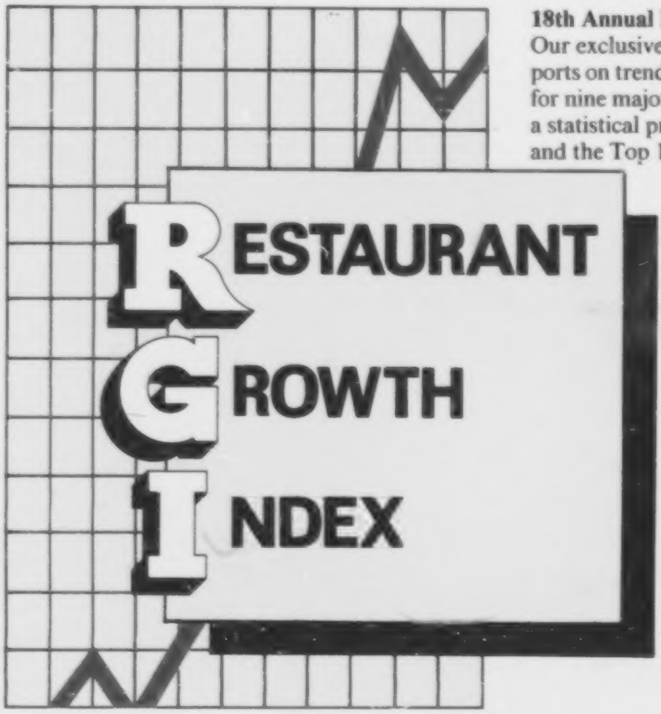

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Market Segment Report

Pizza Hut's Priazzo. An emphasis on freshness and quality ingredients is heating up competition among pizza chains.

New products deliver quality and freshness

by Jacque White Kochak

Pizza chains have been attracting new customers steadily and posing a real threat to independents by the simple tactic of giving customers what they want. Delivery is the hottest trend in the segment, sparked by the phenomenal success of Ann Arbor-based Domino's. At the same time, chains are introducing new pizza products and expanding their menus with other Italian specialties. Some operators are even experimenting with breakfast.

Pizza operators are responding to the same trends sweeping the rest of the foodservice industry by upgrading both food and decor. However, the much-publicized "gourmet pizza"—featuring exotic toppings from goat cheese to walnuts—that is still popular in upscale, full-service eateries, hasn't caught on in mainstream pizzerias.

What has caught on is an emphasis on freshness and quality. Some operators are demanding only the finest ingredients for their pizzamaking, and display-cooking of pizza—with fresh ingredients all lined up on the counter in full view of customers—is gaining popularity.

As chains expand, the pizza business is becoming more competitive. "Because of the increasing competition, consistency is becoming very important," says Keith Glenn, director of marketing for Pizza Inn, one of the largest pizza chains in the country with 720 units and 1984 systemwide sales of $252 million. "Also, advertising will have to be more effective. Pizza restaurants haven't 'branded' themselves well enough in the past. They're going to have to take a more methodical approach to developing an identity with the public."

Pizza outlets in the U.S. have passed hamburger outlets in number of units. There are 31,053 pizza restaurants in the U.S., according to figures prepared by the Restaurant Consulting Group, Inc., compared to 26,585 hamburger restaurants, and only 12,487 Oriental restaurants, 11,851 Mexican restaurants, and 8,531 fish/seafood restaurants.

Yet burger restaurants dwarf pizza restaurants in sheer dollar volume, according to The Fast Food and Multi-Unit Restaurant Business report prepared by Business Trend Analysts, Inc. Figures are unavailable for the myriad of pizza independents, but pizza chain operators grossed $5.2 billion in 1984, compared to a mammoth $20 billion for burger chain outlets. Even with independents' sales added in, pizza couldn't approach that number.

Why the discrepancy? First, pizza chain restaurants typically have lower volumes than hamburger outlets. And second, unlike the hamburger segment, the pizza segment is still dominated by small mom-and-pop operations, often tiny dining rooms in strip shopping centers. The owner knows the names of many of his customers. They, in turn, are loyal to his particular combination of crust, sauce, and toppings.

The pizza segment undoubtedly will be a stronghold of the mom-and-pop operator for many years to come, but pizza chains are going

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through a period of unprecedented growth. According to Department of Commerce figures, the number of franchised pizza chains has grown by two-thirds between 1978 and 1982, from 66 to 106.

At the same time, sales have grown dramatically. Sales of pizza companies that franchise increased 144 percent between 1979 and 1984. Only Mexican restaurants and outlets serving "sandwich and other," as the DOC categorizes them, exceeded that growth rate.

Nevertheless, pizza companies are still largely regional. Only three companies—gigantic Pizza Hut, with 4,332 domestic units and $1.9 billion in sales; up-and-coming Domino's, with 2,300 units and $625 million in sales; and struggling Godfather's, with some 900 units and $312 million in annual sales—could truly be called national presences. Several other chains have units strung from coast to coast, but in far fewer numbers.

Pizza Hut is far and away the largest pizza chain in the country. Current expansion plans, which call for 200 new units domestically for the next five years, may make the distance even greater.

Pizza Hut was long considered a slumbering giant, with a massive market presence but uninspired execution. All that began to change with the introduction of its pan pizza (which now accounts for 70 percent of sales), followed by the personal pan pizza in 1983.

Domino's also is on the expansion track, but Godfather's has faltered due to a number of complex reasons. Internal management strife, tough new competition from Pizza Hut, and the failure of Godfather's own

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THE PIZZA SEGMENT'S TOP TEN*

Name	1984 Sales	No. Units	Avg. Unit Volume	Outlook
Pizza Hut	$1.9 billion	4,332 (domestic)	$450,000	200 units a year for next five years. Emphasis on urban areas such as New York, Chicago, L.A.
Domino's	$625 million	2,300	$416,000	Beginning international expansion with units planned in Germany and other European countries.
Godfather's	$312 million	900	$450,000	"Wait and see" strategy following acquisition of parent Diversifoods by Pillsbury.
ShowBiz Pizza Place	n/a**	364	$950,000	Concept revamping could give ShowBiz a shot in the arm. Marginal units have been closed but owner Brock Hotels Corp. remains confident.
Pizza Inn	$252 million	720	$415,000	Expansion resumed after four years of retrenchment. Expanding on military bases and overseas, among other places.
Little Caesar's	$230 million	600	$383,000***	Company executives declined comment.
Shakey's	$200 million	318	$520,000	With revamping, expansion picking up. Close to 100 new franchised locations now under contract.
Round Table	$162 million	430	$440,000	Planning to build 60 new units this calendar year, with majority in Southern California.
Mr. Gatti's	$135 million	350	$450,000	Continuing to penetrate existing markets where the chain doesn't have dominance.
Ken's Restaurant Systems	$130 million	240	Mazzio's: $936,000 Ken's: $500,000	Emphasis on Mazzio's, with five opening per month in the near future. Expansion will focus on the Southeast and Southwest. Scooter's also emerging as an expansion concept, with first franchise just sold in Florida.

**Ranked according to total sales.*
***The merger of ShowBiz and Pizza Time Theater this year creates a much larger chain than in 1984. 1985 sales are estimated at $300 million.*
****Estimated by Restaurant Business.*

According to Dept. of Commerce figures, franchised chains had grown by two-thirds between 1978 and 1982, from 66 to 106 chains.

pan pizza all helped stop Godfather's dead in its tracks.

Pizza Inn, with 720 units and $252 million in sales, has concentrated development in the Southern to Mid-Central part of the country. Little Caesar, with 600 units and $230 million in sales, has a large presence but is not national. Round Table Pizza, with 430 units and $162 million in sales, thrives in California. Mr. Gatti's, with 350 units and $130 million in sales, has developed the Southern tier of states, as has Ken's Restaurant Systems, with 240 units and 1984 sales of $130 million.

Papa Gino's based in Dedham, Mass., dominates New England. Sbarro has a strong presence in the New York market and is steadily expanding westward; 140 units are now open in locations as diverse as New York City and Hutchinson, Kan. Saga-owned Straw Hat Pizza, with 209 units in California, confines its operations to the West Coast. Chains such as Noble Roman, Rocky Rococo, and Pantera's Pizza flourish in the Midwest.

The largest concentration of independents is located in New York and Chicago, which makes these the toughest markets for chains to crack. In fact, 6,334 pizza restaurants, or 13.9 percent of the total restaurants in the Middle Atlantic region encompassing New York City, specialize in pizza. A total of 6,797, or 13.3 percent of total restaurants in the East/North Central area encompassing Chicago, specialize in pizza. Pizza is also very strong in the New England states, where 2,213 restaurants, or 13.4 percent of the total specialize in pizza.

Pizza is least well represented in the West/South Central region, where only 6.6 percent of restaurants, or 2,710, offer it as a specialty.

Each region has its own special style of pizza, but as menus are broadened and chains charge into new areas, each style is being introduced into new localities.

Most distinctive are the Chicago-style deep-dish and stuffed pizzas made famous by Chicago institutions—one might say monuments—such as Gino's East, Pizzeria Uno, and Giordano's. All three landmark restaurants were founded by workingmen who loved pizza. Cabbies Sam T. Levine and Fred Bartoli founded Gino's East, Ike Sewell nurtured Pizzeria Uno to prominence, and Joe Boglio made Giordano's stuffed pizzas famous.

Then along came savvy marketers who saw the potential for expansion in these concepts. Giant Collins Foods purchased Gino's East last year, and in combination with Chicago's innovative Lettuce Entertain You organization plans to take the concept nationwide. A prototype unit just opened in Rolling Meadows, Illinois, and two more units have opened on Collins' home ground in California. A location opened in Brisbane, Australia, in August, and eight more restaurants will open in 1986 throughout California.

Seven years ago, Aaron Spencer purchased expansion rights to Sewell's Pizzeria Uno, and development is well underway. There are now 22 Pizzeria Unos outside of Chicago, with eight company-owned and 14 franchised. Eight more units will open this year.

Pizzeria Uno's prototype unit in Springfield, Mass., combines a '20's ambience with black and white tones and brass.

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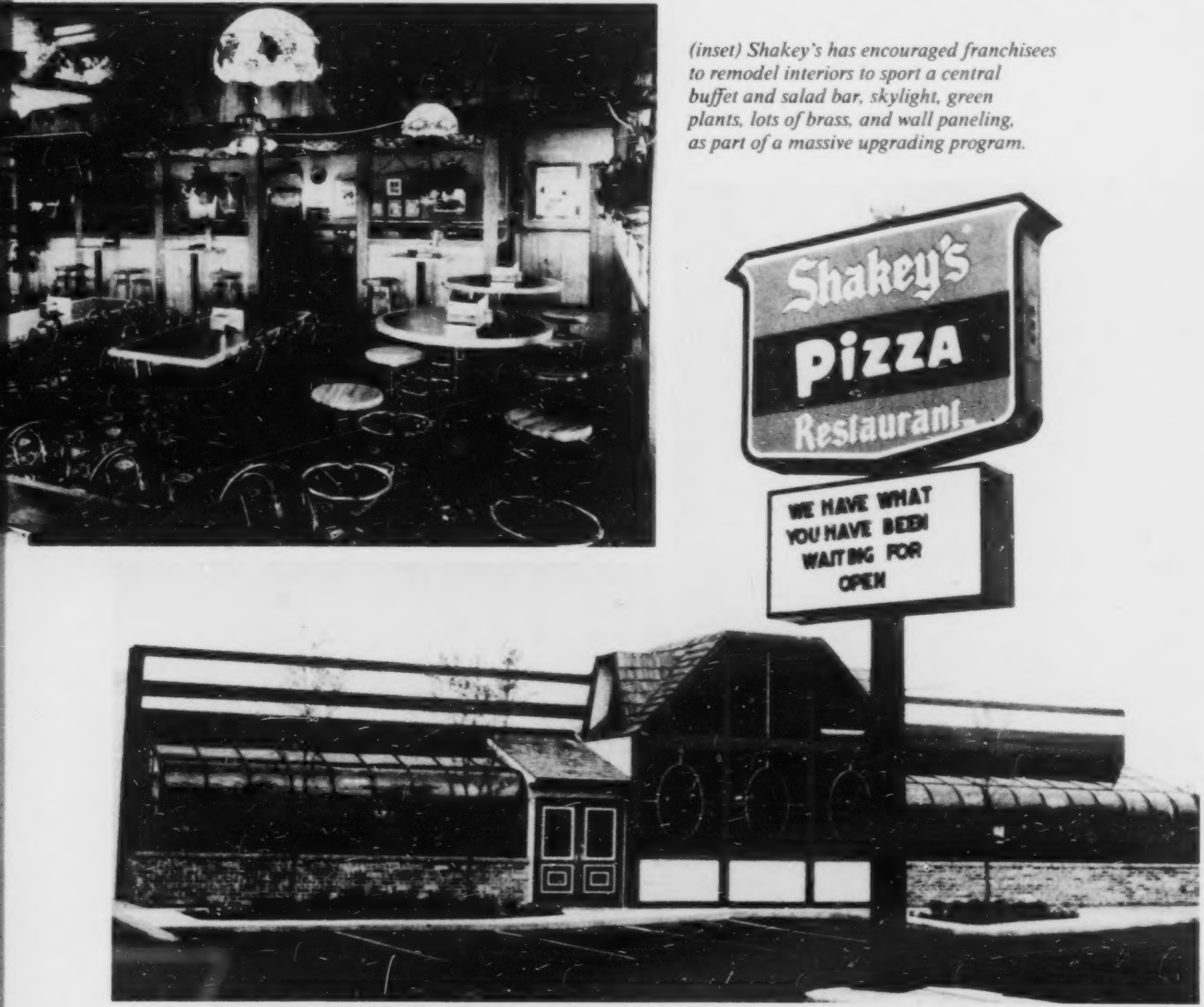
And expansion of Giordano's, famous for stuffed pizza, is also heating up. Consultant Craig Slavin, president of Franchise Architects, Inc., became so enamored of the Giordano's concept when Boglio came to him for advice on expansion that he purchased part of the company and took the position of president. There are now 14 restaurants in operation, with eight more under construction in Chicago and five more in Iowa. "We've sold approximately 35 franchises on the West Coast, in the Midwest, and in Florida," says Slavin. ' And we're going after the San Francisco Bay Area."

Sbarro, run by the three Sbarro brothers and headquartered on Long Island, is taking New York-style pizza westward, primarily in mall locations, and Pizza Inn is also introducing a New York-style pizza, which director of marketing Keith Glenn describes as slightly thicker than thin crust, made with high-gluten flour and with a chewier consistency than the crisp crust characteristic of the lower Midwest and South. "This is the kind of pizza you can fold up and carry with you," says Glenn.

Delivery

The meteoric rise of Domino's, with a business based on pizza delivery, made operators in the pizza segment sit up and take notice. In fact, 40 percent of all Americans say they had a pizza delivered between February and May, according to a National Restaurant Association study. That makes pizza delivery the most popular of the 15 "hottest" concepts delineated by the NRA. (The 15 concepts, covered in the NRA report, range from regional American cuisine to upscale hamburgers to gourmet take-out.)

Domino's Pizza posted sales gains of 45 percent a year throughout the '70s, and in the past six years some 2,000 new units have been added. In fact, an astounding 850 units opened



(inset) Shakey's has encouraged franchisees to remodel interiors to sport a central buffet and salad bar, skylight, green plants, lots of brass, and wall paneling, as part of a massive upgrading program.

The new Shakey's exterior features greenhouse atriums for a modern effect.

Pizza delivery, spearheaded by Domino's, made other chains take notice. Forty percent of Americans had a pizza delivered between February and May.

between July 13, 1984 and July 13, 1985. Currently, Domino's has about 2,300 units. Delivery accounts for 90 percent of sales; average unit sales are $416,000 annually. And now Domino's, which already has stores in Canada and Australia, is planning expansion into Germany and other European countries. A new international department has just been established.

The other major chains couldn't ignore the popularity of delivery. Among the markets where Pizza Hut is testing delivery are Norfolk and Virginia Beach, Va., and Cedar Rapids, Iowa, where the program is called Pizza to You and 20 delivery trucks are operating. Pizza Inn is also testing delivery, and Austin, Texas-based Mr. Gatti's has made a commitment to roll out its delivery program chainwide.

The latest twist on pizza delivery is one-number dialing. The customer can dial one number in a city, then receive delivery from whichever unit is closest to him. Pizza Hut is testing such a system, and Mr. Gatti's feels it has perfected a one-number system. "Just dial 459-2222. It doesn't matter where you are in the Austin ADI, you'll get our pizza," says Dave McKenzie, Mr. Gatti's new director of marketing.

McKenzie says that Mr. Gatti's is, in effect, selling that number, which is promoted on radio, TV, and billboards. Sales in the Austin market have increased 60 percent since one-number delivery was formally instituted last fall, he points out.

Tulsa-based Ken's has been testing a delivery-only concept called Scooter's. There are now nine in operation, and in the future, Scooter's will be one of Ken's primary expansion vehicles, says director of marketing Greg Lippert. "The Scooter's concept is far stronger than we expected at this time," he admits. "Scooter's are doing $7,000 to $12,000 a week out of 1,800 sq. ft. in in-line shopping centers."

Chicago's Giordano's is testing a cafe and "take-away" concept. Larger units now offer delivery, and in some cases delivery accounts for 30 percent of sales. The Giordano Cafe & Take-Away units are smaller facilities strategically positioned between larger units, which facilitates delivery. President Slavin anticipates that delivery will account for 60 percent of future cafe sales.

Giordano's also has initiated a twist on urban delivery; instead of taking the pizza to the customer, a van takes the customers to the pizza at three locations in Chicago. A Giordano's van goes to office buildings on a staggered schedule, picks up customers, takes them to dine, then takes them back to work at no charge. The whole excursion takes only an hour, says Slavin.

One rapidly expanding chain that banks on pizza delivery is Chapel Hill, North Carolina-based Pizza Transit Authority, founded in 1973. The company now operates 39 units,

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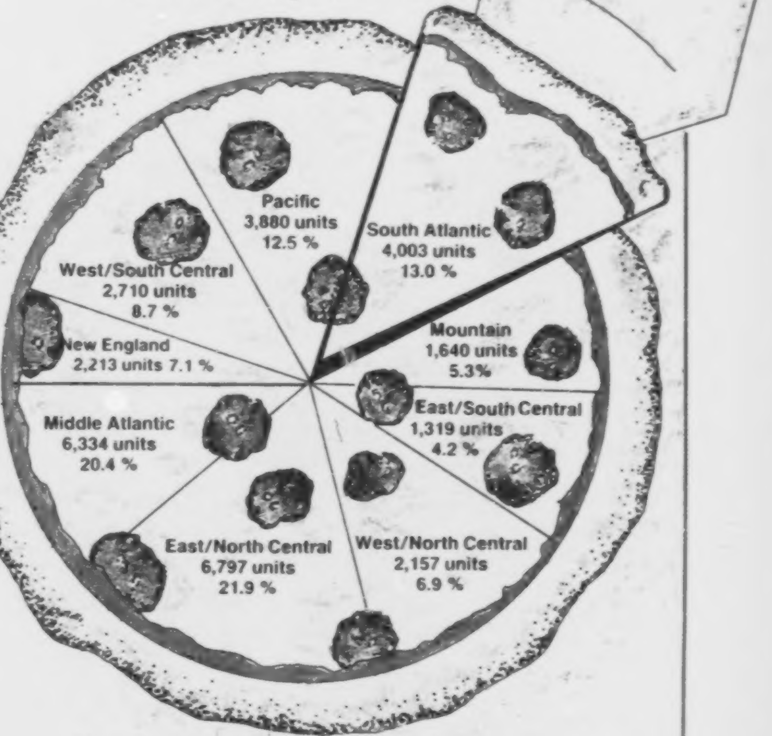
Pizza segment market share

Concentration of pizza restaurants occurs in the East/North Central and Middle Atlantic regions—a combined share of over 40 percent of the total.



Note: Percentages represent distribution of pizza restaurants by Census regions. There are 31,053 pizza restaurants in the U.S.; 10.3 percent of total U.S. restaurants.
Source: Restaurant Consulting Group. RECOUNT, Spring 1984.

The latest twist on pizza delivery is one-number dialing. Customers order by dialing a central number; delivery is made from the nearest location.

MAZZIO'S PIZZA
MAZZIO'S PIZZA

Mazzio's units decorated in neon and brass post average volumes of $500,000.

38 of them franchised. PTA units offer absolutely no eat-in service, and only five percent of sales is take-out. The company went public in January and is plotting aggressive expansion, but new vice president of marketing Sherri Van Saxon is keeping plans under wraps. She also declined to give sales figures.

Pizza Transit Authority recently named as president Thomas Charters, formerly executive vice president and CEO for Luther's Bar-B-Q and former president of Farrell's Ice Cream Parlour Restaurants. Charters says he attributes the growth in pizza delivery to two things: the high value baby boomers place on service, and the increasing emphasis on a quality home environment. "Those segments of our population having the most impact have a great deal of discretionary income," notes Charters. "A large part of that income is spent on the home environment. The baby boomer family is beginning to seek an eating experience that can be enjoyed within the luxury of the home. Gourmet take-out and home delivery answer this need."

Menu expansion

One of the most significant trends in the pizza segment, as in every segment of the foodservice industry, is the expansion of menus to build volume. Another important trend is the upgrading of food. With pizza, that generally means new and different toppings, and variations on the traditional pizza product.

Pizza Hut started the move in 1980 by introducing pan pizza, and several chains followed suit. A revamped Shakey's has just introduced a new pan pizza, as has Ken's Restaurant Systems. Now Pizza Hut has introduced its Priazzo, a stuffed pie similar to Giordano's, causing a sensation throughout the segment.

"Our research shows that people are going for quality. People are willing to pay more for quality," says Michael Jenkins, director of public relations for Pizza Hut. "We want to bring a new, upscale customer into the fold with the Priazzo, in addition to our existing base."

Priazzo is available in three varieties: cheese, ham, and spinach-stuffed Priazzo Florentine; meat-stuffed Priazzo Milano; and pepperoni, cheese, and mushroom-stuffed Priazzo Roma. The top crust is then covered with cheese and pizza sauce.

In addition to massive television advertising, the new product introduction is being touted by Priazzo bibs distributed in-store and by T-shirts proclaiming, "I brake for Priazzo."

Pizza Inn is also rolling out a stuffed pizza, but director of marketing Glenn is adamant in saying that the product was in test long before the Pizza Hut's Priazzo was introduced. "You can't develop a product like this overnight," he notes.

He adds that the time was ripe for such a product, with its abundance of ingredients. "People perceive a good pizza to have a lot of cheese and toppings," he says. "A thin-crust pizza can only hold so much, so the deep dish pizza was introduced. Then there's a limit to how much a deep dish pizza can hold, so the stuffed pizza is the answer."

Pizza Inn resumed expansion in 1984 following four years of retrenchment, with company stores reduced from more than 350 to less than 275. After dipping sales in the latter part of 1984, sales are again on the rise, up five percent over last year. Glenn says that the major growth in average unit sales will come via new product introductions.

Some companies are experimenting with unusual toppings. Ken's Restaurant Systems, for example, has introduced a taco pizza and a barbecue pizza. The taco pizza is an original crust topped by pizza sauce, hamburger, lettuce, tomato, black olives, cheddar, and mozzarella. Taco sauce is available on the side. The barbecue pizza is topped by shredded barbecue meat with pizza sauce.

The taco pizza is accounting for 15 to 20 percent of the sales mix now, says director of marketing Lippert. The barbecue pizza is accounting for about 15 percent of sales, and the newly introduced pan pizza has captured 30 percent of sales.

Saga's Straw Hat Pizza last spring introduced a "Real California Pizza" topped by fresh vegetables and California cheeses. Last June, Saga announced that it would divest itself

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Pizza chains will have to adopt "a more methodical approach to developing an identity with the public." —Keith Glenn, dir. of marketing for Pizza Inn.

of Straw Hat, then in November decided to keep the subsidiary. The new pizza is part of the "multifaceted, very aggressive improvement program to upgrade the chain," says Gene Elsbree, Saga's vice president of communications, who adds that details are confidential at this point.

A fair amount of emphasis is being put on increasing sales by adding additional pizza-related products, such as calzones. A calzone, which can be called an Italian style turnover, is made with pizza dough and stuffed with ricotta cheese and other ingredients. This product is common in the Northeast but unfamiliar in many other parts of the country. Pizza Hut is now testing a calzone, but spokesman Jenkins points out that the product is difficult to cook using Pizza Hut's ovens.

California-based Round Table Pizza has rolled out a calzone stuffed with ham, olives, onions, tomato and a blend of cheeses, topped with sauce and green onions, to boost luncheon sales. Price is $3.50. And New York-based Sbarro has found success in all parts of the country with its calzone, a standard since the chain's early days.

Round Table is typical in trying to boost luncheon sales by upgrading its sandwich line and by adding several new products. In addition to the calzone, Round Table now offers a "Personal Country Pie" for $2.50, as well as soup and garlic bread. An unusual addition is "Pizza Tatos," or potato skins with pizza toppings. Sales are up 16 percent in some units with the new items, says director of public relations Dennis Fong.

The new owners of Gino's East in Chicago are dramatically expanding that concept's menu. To create the expanded menu, Lettuce Entertain You worked with chef Dennis Terczak of Chicago's Avanzare, which is affiliated with LEY and with Harold Elder, LEY's corporate chef. The menu emphasizes fresh, high-quality ingredients and includes antipasti, salads, and pasta entrees.

The featured antipasto is Rotoli, fresh-baked Italian rolls seasoned with butter, garlic, and parmesan cheese. Other antipasti include fried mozzarella and pomodoro sauce; fresh mushrooms stuffed with mozzarella, cream cheese, ham, sherry, and cream; calamari with puttanesca sauce; and fresh artichokes stuffed with bread crumbs, sherry, and pecorino romano cheese.

Six spinach and egg pastas are homemade daily. A variety of Italian sandwiches, minestrone and soup of the day, plus ice cream and Italian ices round out the new menu.

Mr. Gatti's is testing several pasta dishes, and Pizza Inn has expanded its Pasta Buffet in certain markets to include four noodles and four sauces. Pizza Inn is also testing self-service drink bars, with free refills, in some stores.

Taking a different approach, Ken's has "Sweet Shoppes" in four units. The Sweet Shoppes offer gelato, fudge brownies, and chocolate chip cookies baked in the unit.

Pizza restaurants are even venturing into breakfast. Domino's tested breakfast in Dayton, Ohio, and is now evaluating the results. Customers were extremely pleased with the service, says Char Reese, director of market research.

In the Domino's test, something called "Bakeups" were delivered along with a copy of *USA Today* and coffee or orange juice. Customers could even call the night before for a wake-up call, says Reese. A Bakeup is a pizza shell with tomato sauce, topped with anything from eggs to a cinnamon streusel mix. The whole package was priced at $4.95.

Giordano's is also plotting expansion into the breakfast segment. Its entree is a quiche-like breakfast pie stuffed with scrambled eggs and other ingredients. The top layer of dough is coated with oil and butter.

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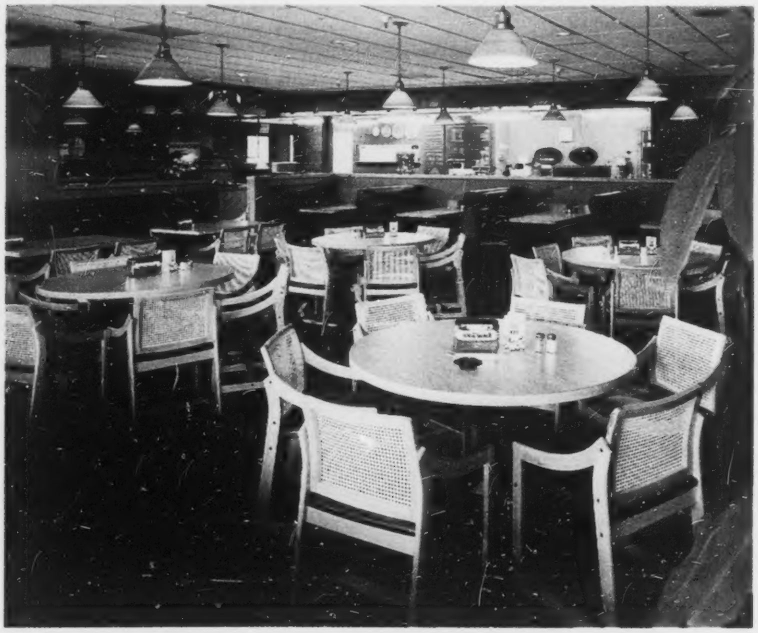

Round Table now offers Pizza Tatos and Personal Country Pie.

New and different pizza toppings, along with variations on the traditional pizza, are geared towards building volume and appealing to upscale consumers.

Breakfast will be offered in high-density downtown locations and office buildings, says Slavin.

Upgrading facilities

Another significant trend in the pizza segment is the upscaling of facilities. The experience of Ken's Restaurant Systems (KRS) explains why this is happening.

KRS has operated two concepts for several years: Ken's and Mazzio's. Ken's is the standard pizza parlor of yesteryear, while Mazzio's is a snazzier version with neon, lots of brass, and video games. Mazzio's posts average unit volumes of $936,000 compared with Ken's average unit volumes of $500,000.

Sensing the trend, Shakey's new owners, Gary Brown and Jay Halverson (former Shakey's franchisees), have embarked on a massive upgrading program. Franchisees are being encouraged to add greenhouse atrium additions to the front of units, which give a modern, open appearance. An attractive brass-fitted buffet and salad bar takes center stage in a remodeled dining room with a centrally located skylight, live green plants, lots of brass, and rich wall paneling. Upgrading is already underway in 10 percent of units, according to management.

Pizzeria Uno, Gino's East, and Giordano's are all building upscale prototype units, in some cases a far cry from their rather rustic Chicago forebears.

Pizzeria Uno's prototype is located in Springfield, Mass., and reflects a late '20s or early '30s ambience. In the style of today, there is plenty of brass, with a green color motif accented by black and white checks.

The new Gino's East in Rolling Meadows, Ill., seats 300 people at booths and tables on two floors. Brass wall sconces, rough-sawn cedar walls, and a floor-to-ceiling exposed-brick wall in the center of the main dining room create a comfortable atmosphere.

At the original Gino's East, part of the charm is the generations of graffiti scrawled on walls. Customers at the new Gino's East will be encouraged to continue the tradition.

The Giordano's prototype is dominated by a central display kitchen, with dining and waiting areas wrapped around the kitchen. The facility features off-white stucco walls, with warm gray and warm orange trim. Everything from uniforms to logoed dinnerware has been redone in the gray and orange tones.

Sbarro has found success in all parts of the country with its calzone.

Entertainment concepts

Since 1980, the two giants of the pizza/entertainment segment have fought a fierce battle for business, both suffering as the market became oversaturated. The rivalry ended recently when Brock Hotel Corp., ShowBiz Pizza's parent company, purchased Pizza Time Theater, which last year filed Chapter XI. Consequently, the "new" chain has a considerable presence in the marketplace.

As part of an effort to rebuild the troubled chain, owner Robert Brock recently hired Richard M. Frank, former executive vice president and chief operating officer of S & A Restaurant Corp.

The chain is also downplaying video games and aiming at an audience of children up to 12 or 13—as well as their parents, of course. The revamped concept includes kiddie rides, carnival games, and family skill games.

Changes in the dining room include introduction of big-screen mini-movies and a new method of entertainment by robot Billy Bob, in which an unseen operator can carry on conversations between the bear and children in the audience.

Nevertheless, the company still faces hard times, mainly because of Brock's top-heavy debt load. Early in July the company completed a management contract on a group of its hotels it had planned to sell to pay off debt incurred by ShowBiz. Under the terms of the contract, income from the hotels will be split between Brock Hotel and ShowBiz creditors, after Brock has deducted a management fee. The company also has sold some of its hotel assets to help pay ShowBiz debt. □

Liquor legislation: state by state analysis

by James E. Peters

Legislation must be created which recognizes the positive steps taken by the food and beverage industry to serve alcoholic beverages more responsibly.

Although some states have moved in the direction of repealing liquor liability laws, many others are broadening the scope of liability, particularly through common law. The most promising approach is to modify provisions of current law, rather than seeking repeal of all liability.

Options for dram shop legislation include: Establishing industry standards on responsible beverage service practices; creating legal, regulatory, and insurance incentives for compliance with these standards; establishing alternate methods of victim compensation; and enforcing current regulations rather than creating new ones.

A number of states are taking steps to reform existing statutes or rein in open-ended court decisions, and some are simply defeating attempts to enact new dram shop liability.

South Dakota legislation, referred to as "reverse dram shop," was recently signed into law, and says, in effect, that bartenders and owners are not liable. In 1978, California repealed dram shop liability; however, two bills were introduced this past legislative session reinstating dram shop. They have been postponed until January for consideration.

The next closest repeal legislation was signed into law on June 13 in Missouri. This legislation, sponsored by Sen. Henry Panethiere, (D) would require a conviction for illegal service before any civil action could be initiated by a third party. In New Mexico, *SB 474*, a dram shop reform bill, was enacted this year, and requires much stronger standards of proof in a number of areas in order that the server be held liable.

To be sure, momentum of the anti-drunk driving movement continues, and public sentiment is becoming less tolerant of irresponsible serving practices of bars and restaurants. With all the positive activity by the industry to serve alcohol more responsibly, it is necessary that legislation be created which recognizes these efforts. The following is a brief summary of options being considered by legislatures.

Establish liability cap

The only states which currently have a cap on liability are: Connecticut, $50,000; Illinois, $15,000/$20,000; North Carolina, $500,000 (sale to minor). Michigan's legislature is considering a $100,000 cap, and Oregon a $50,000 cap.

Pro: More clearly defined risk for insurers will undoubtedly make them more willing to write coverage.

Cons: Since there is not a lot of legal precedent for caps, a strong, organized lobbying effort is probably critical for widespread passage.

If a cap is set too low, there is more incentive to settle quickly in cases where there is not necessarily fault on the part of the licensee. Legal costs could equal or exceed cap.

Too high a cap would promulgate higher premiums, leaving insurers less willing to write coverage.

Strong opposition by victims' groups and trial lawyers is likely to focus on placing a limit on the value of a human life.

In general, recovery caps are in conflict with basic tort law principles, which assume that a plaintiff has a right to full recovery, regardless of amount, if he can prove defendant's fault and amount of loss.

Type of recovery

In Minnesota, *HF 265* was passed and awaits the signature of Democratic Governor Perpich. It contains a provision which will end the awarding of pecuniary (intangible) damages and limit to primarily economic losses (i.e. property damage and medical expenses).

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Dram shop *continued from page 122*

Pro: Provides innocent victims with compensation for immediate expenses, but keeps overall settlement lower.

Cons: Could be declared unconstitutional because it takes away discretionary power of jury in determining fair compensation.

Strong opposition by victims' groups and trial lawyers.

There is little precedent for this type of legislation, and it would be argued that a new class of liability would be created specifically for the bar and restaurant industry.

Attorney fees

Regulations on how high a contingency fee for attorneys can be is something that can be regulated by the state. An example is a 10 percent limit on attorneys' fees in workman's compensation.

Pro: In some cases, 20 to 50 percent of the settlement goes to the attorney rather than the innocent victim. Establishing a cap on attorney fees would more fairly compensate the victim, and potentially reduce the overall settlements or filing of frivolous lawsuits.

Con: No or too low contingency fee would prohibit many people from obtaining legal counsel.

Responsible business defense

Currently, only one dram shop statute allows a "responsible practices" defense against liability, North Carolina. Several other states have introduced modified versions of the Model Dram Shop Act developed by the Prevention Research Group, Berkeley, California, which establishes responsible business practices as a defense. These states are Michigan, California, Oregon, and Hawaii. Other states with commissions considering the Model Act are Massachusetts, Florida, Wyoming, and Oklahoma.

Pros: The Model Act provides a defendant a means of protection from liability if it can be shown that, at the time of service of alcoholic beverages, the defendant was following those business practices which an ordinarily prudent person would follow with the same duty under like circumstances.

It creates greater incentives for current efforts by bars and restaurants to provide staff training, alternative transportation, alternative beverages, and promotion of food.

It overcomes the difficulty in recreating the particular circumstances of the sale and the very subjective and uncertain nature of the "obvious intoxication" standard.

Con: One argument often cited against the responsible practices defense is there could be an increase in liability of the bar or restaurant if certain business practices are adopted too enthusiastically (a "good samaritan" rule). However, the duty already exists to avoid serving an intoxicated person and minors. An establishment that chooses to not fulfill this duty, does so at its own peril.

Notice provisions

A notice provision is that period of time during which a defendant establishment must be notified that a claim is being pursued against it. Only three of the 23 existing states include notice provisions–Connecticut (60 days), Iowa (six months), and Minnesota (120 days).

Pro: Allows a defendant to inves-

continued on page 126

Liquor liability laws, state-by-state

State	Dram Shop	Common Law Negligence	No Law
Connecticut	x		
Delaware			x
District of Columbia		x	
Maine	x		
Maryland			x
Massachusetts		x	
New Hampshire			x
New Jersey		x	
New York	x		
Pennsylvania	x		
Rhode Island	x		
Vermont	x		
Alaska	x		
Arizona		x	
California	x		
Colorado	x	x	
Hawaii		x	
Idaho		x	
Montana			x
Nevada			x
New Mexico	x	x	
Oregon	x	x	
Utah	x		
Washington		x	
Wyoming	x	x	
Illinois	x		
Indiana		x	
Iowa	x		
Kansas			x
Michigan	x		
Minnesota	x		
Missouri		x	
Nebraska			x
North Dakota	x		
Ohio	x		
Oklahoma			x
South Dakota		x	
Texas		x	
Wisconsin		x	
Alabama	x		
Arkansas			x
Florida	x		
Georgia	x		
Kentucky		x	
Louisiana		x	
Mississippi		x	
North Carolina	x	x	
South Carolina			x
Tennessee		x	
Virginia		x	
West Virginia			x

Source: National Restaurant Association

Dram Shop *continued from page 124*

tigate a claim while the underlying facts are still fresh. Since dram shop cases often involve accidents occuring off-premise, defendants often will have no knowledge of the accident until informed by the plaintiff. Absent a notice provision, a defendant may not learn of a claim until just prior to expiration of the appplicable statute of limitations, which may be a period of several years.

Con: Notice provisions are an extension to the general rule in civil liability law. The law abounds with the imposition of civil liability for injuries occuring outside the presence of a defendant for which no notice is required.

Limiting recovery

Generally, in states with dram shop statutes, the drinker is not allowed to recover damages. However, there is an increasing number of common law cases allowing the drinker, as well as the innocent third party, to recover, especially in cases involving a minor.

Some states allow the drinker to recover when there is reckless behavior by the defendant bar (i.e. serving 11 shots of 151 rum in 1 1/2 hours, *Ewing vs Cloverleaf Bowl, 143 CAL Rptr. 13, 1978).*

In addition to a statute only allowing recovery by the third party, the following three mechanisms can also limit recovery by the drinker. A state usually has one of them.

Comparative negligence: The court calculates the percentage of fault of each of the parties in a lawsuit (i.e. defendant bar, 20 percent, defendant drinker, 40 percent, and plaintiff, or innocent third party, 40 percent). If the plaintiff is more than 50 percent at fault, there is generally no right to recovery. Whatever the judgment, each must pay according to the percentage of fault. For instance, a $200,000 settlement in the above case requires $40,000 by the defendant bar, and $80,000 by the defendant drinker. In some cases, if the defendant drinker does not have the ability to pay, the total burden falls on the defendant bar.

Contributory negligence: If it can be shown that the plaintiff was negligent in any way, a claim can be denied altogether, even if the defendant bar was 95 percent negligent.

> Liability caps are likely to be fought by victims groups and lawyers who oppose placing a limit on the value of human life.

Complicity doctrine: In general, the drinker and/or companions of the drinker cannot recover. This doctrine may or may not be included in a dram shop statute, and is not applicable under common law.

Insurance

There are several mechanisms for providing insurance to individuals or companies entitled to coverage, but unable to obtain it. Some states require a bar or restaurant to have liquor liability insurance, such as Minnesota, or the threat of liability is so great that insurance is almost mandatory, like in Massachusetts, New Jersey, Maine, and Michigan. Insurance companies have withdrawn from these markets, making it necessary for the legislature to take immediate action to create some type of insurance.

Assigned risk plan. Mandated by legislature, policies are assigned to various carriers on a rotating basis. An example of this is New York's assigned risk plan for young drivers. Drawback of this system is that a policy can be provided by a company without the necessary assets to cover potential losses.

Joint underwriters association. Mandated by legislature, an association of insurance companies is formed to provide certain types of insurance. This system is often used for medical malpractice. Massachusetts recently passed legislation which forms this type of association, giving it the responsibility of writing liquor liability insurance.

Insurance "pool." Government provides authority to avoid antitrust agreements, for insurance companies to form a pool to write particular types of coverage. This is often referred to as syndicated insurance, and most often operates on a voluntary rather than mandatory basis.

Other considerations

Exclusive remedy. Although North Carolina has one of the most progressive dram shop statutes with a dollar cap on liability and a responsible business practices defense, it is not the exclusive remedy for dram shop, and lawsuits are filed using common law principles. Once a fair and realistic dram shop statute is developed, it should be the exclusive remedy for recovery.

Privileges. Bars and restaurants that establish procedures for minimizing consumption of alcoholic beverages by minors or intoxicated persons may face potential liability claims by those affected by the procedures. False imprisonment, intentional infliction of emotional distress, and conversion are among the most likely civil claims that may arise. These are usually for minimal damages and are more in the nature of harassment. Provisions should be placed in a statute which will limit harassment claims.

Alternate victim compensation. Dram shop liability is increasing for the most part because of efforts to compensate innocent victims of drunk driving accidents. This system can be unfair and arbitrary, allowing only those victims with a "good case" to obtain qualified legal counsel, leaving many other innocent victims uncared for. Alternate means of victim compensation would avoid this problem, and reduce many unnecessary claims against bars and restaurants, or provide funds over amount of insurance or liability "cap."

Legislation has been introduced in Oregon which would establish this type of fund. Financing would come from drunken penalties, licensing fees and other sources.

James E. Peters is executive director of Northampton, Mass.-based Intermission, Ltd., a nonprofit center for study of social responsibility in the hospitality industry.

Restaurant Business Cover Story

18TH ANNUAL

RESTAURANT GROWTH INDEX

The 18th Annual Restaurant Growth Index (RGI) is our exclusive analysis of the foodservice industry published each September. It begins with a comprehensive report on the important trends, including sales, purchases, and real growth data in nine major market segments—separate eating and drinking places, hotel/motel, transportation, leisure, retail, business and industry, student, healthcare, and military—and 38 sub-market segments. New this year is the inclusion of unit counts and per capita sales. Following this study on page 200 is our statistical profile of the nation's 316 metropolitan areas and 214 ADIs. For the first time the Top 100 metro and ADI rankings include eating place sales as well as per capita sales for each of the top 100 eating place, restaurant, and fast food markets.

In this year's edition of the Restaurant Growth Index (RGI), we provide hard data for 1983, best estimates for 1984 (the last full year), and a five year projection to 1989.

This year, we add the number of locations by market segment to the Restaurant Growth Index. The bulk of the location counts are derived from the 1982 Retail Trade Census. The counts in the ADI and MSA sections are based on County Business Patterns and will differ from the Retail Census Data primarily because of a consolidation in reporting units at the county level for multi-unit ownership in the County Business Pattern data for units under 10 employees. The reason we have added unit count data is because you, the readers, have asked for it. The statistical picture is incomplete without the number of units since growth is primarily unit driven.

Foodservice sales in 1984 advanced 8.2 percent to a total of $163.5 billion, a nominal gain of $12.4 billion and a real gain of $6.0 billion. We must view the absolute numbers of growth, not percentages. As the industry gets larger, percentage gains will decline but total real growth will continue.

The 1984 size of the foodservice industry at $163.5 billion is a conservative figure as it does not include a commercial equivalent dollar volume for military feeding (troop feeding) or school foodservice (we count as actual sales only cash paid by the students); and it does not include vended can soft drinks or vended candy. We show food and beverage sales for establishments with payroll only*.

For 1989, we project foodservice sales of $231.2 billion. This is a compound annual sales gain of 7.2 percent or $67.8 billion over five years. In real terms, the growth rate is 2.6 percent or $22.3 billion.

Even in a basically bottomed out menu price level of 4.48 percent over the next five years, inflation still accounts for 67.1 percent of sales gain. Where real growth is above the industry level, the proportion of real growth to total sales in the category will be substantially higher as can be seen in the convenience food store sector with a compound annual nominal growth rate of 25.1 percent and a real growth rate of 19.7 percent. In this case real growth is 70.8 percent of total growth.

Compared with last year's five year forecast 1983-1988, real growth at 2.6 percent is 0.2 points lower in 1984-1989. The principal difference is 1984-1989 has a negative −0.4 percent institutional/internal real growth rate. The real commercial/contract rate at 3.0 compound annual percent is the same. What has changed is the composition of growth within the group. The lead-

Foodservice Industry Summary

	1983 Sales ($000,000)	1983 Units ($000,000)	1983[1] Purchases	1983 VS 1982 % Sales Growth ($000,000)	1984 Sales ($000,000)	1984 Purchases	1984 VS 1963 % Sales Growth ($000,000)	1989 Sales Annual Growth	1984-1989 % Compound Nominal	1984-1989 % Compound Real
Total Market	151,082	560,209	62,946	8.1	163,469	67,775	8.2	231,227	7.2	2.6
Commercial/Contract	130,228	412,283	49,302	9.1	141,821	53,613	8.9	204,700	7.6	3.0
Institutional/Internal[2]	20,088	146,670	11,542	1.8	20,828	11,944	3.7	25,428	4.1	−0.4
Military[3]	766	1,256	2,102	7.3	820	2,218	7.0	1,099	6.0	1.5
MAJOR MARKET SEGMENTS										
Eating/Drinking Places	103,323	315,541	36,031	9.4	112,666	39,277	9.0	161,793	7.5	2.9
Eating Places	95,173	254,252	33,117	9.9	104,418	36,328	9.7	153,202	8.0	3.3
Full Menu Restaurants	50,514	123,657	17,890	8.8	55,094	19,512	9.1	78,350	7.3	2.7
Limited Menu Restaurants	39,453	113,110	13,414	11.7	43,674	14,849	10.7	66,780	9.0	4.2
Hotel/Motel Market	9,360	29,719	3,023	8.4	10,179	3,288	8.8	14,617	7.5	2.9
Transportation Market[4]	2,311	422	1,011	11.5	2,555	1,119	10.6	4,155	10.2	5.5
Leisure Market	4,507	19,374	1,688	9.3	4,835	1,812	7.3	6,870	7.3	2.7
Retail Market	4,085	56,892	1,428	9.8	4,549	1,589	11.4	8,005	12.0	7.2
Business/Industrial Marke	8,321	11,737	8,958	5.6	8,951	9,579	7.6	12,047	6.1	1.6
Student Market	7,764	93,579	4,946	5.3	8,045	5,087	3.6	9,683	3.8	−0.7
Health Care Market	11,203	31,958	5,457	−1.2	11,502	5,618	2.7	14,016	4.0	−0.4

1. Purchases include all food, nonalcohol and alcohol beverages (does not include equipment or supplies).
2. Community center sales and purchases which are counted in Institutional/Internal sales and purchase totals are not shown in detail in the eight major groups.
3. Sales data based on post exchanges and clubs; purchase data based on post exchanges, clubs and troop feeding
4. Sales of terminal facilities and highway (interstate) are included in Eating places for addition to total market figures.

Note: Full menu restaurant and limited menu restaurant sales are included in eating place sales. Eating place sales are included in eating and drinking place sales and should not be added with other major market segments to arrive at total market sales.

ing real growth gainer in the future is the retail sector due to the coming of age of foodservice in convenience food stores. We project a real compound growth rate of 19.7 percent over the next five years, which is about 6.5 percent of total industry real growth.

The next big winner in percentage terms is the transportation market at 5.5 percent compound annual real growth. With deregulation and a strong promotional fare structure air travel will do very well at 6.8 percent compound annual real growth.

The next major group at 3.3 percent real growth is eating places. This rate is 0.2 points lower than 1983-1988. The major change is the lowering of limited menu restaurant real growth from 4.8 to 4.2 compound annual rate. Despite this decline, which is due to a difficulty of obtaining new sites in the quantity of earlier times and changing demographic mix toward an older society, limited menu restaurants will account for 44.7 percent of the real growth over the next five years.

It is important to note that the sales share of limited menu restaurants of the foodservice industry in 1989 will be 28.9 percent. Clearly, it will continue to have a disproportionate share of the gains in real growth. Full menu restaurants increase their real growth rate by 0.1 percent to 2.7 compound annual growth. While this may not seem great shakes, this sector will account for 35.2 percent of all real growth. Eating places as a whole will generate 83.7 percent of real growth over the next five years. In 1984, eating places accounted for 63.9 percent of sales.

A principal reason for the large share of the growth by eating places, besides their mass, is that the student market and hospitals are losing real growth over the next five years. Hospitals-internal will decline by −2.5 percent compound annual growth due to cost containment which started in 1983. With regard to schools-internal, the compound annual real decline is −3.2 percent.

On the economic side, over the next five years we see real disposable income increasing at 2.91 percent compound annual rate and GNP advancing at 3.05 percent. Thus for eating places, we see a growth rate slightly higher than GNP and for all commercial/contract a rate approximating the GNP.

In summary, the next five years will not be spectacular but for the commercial/contract segments it will be good, with substantial real total dollar growth. □

Industry Real Growth Summary

	1983 % Real Growth Rate	1984 % Real Growth Rate	1984-1989 % Real Compound Annual Growth
Total Market	3.9	4.0	2.6
Commercial/Contract	4.7	4.7	3.0
Institutional/Internal	−0.8	−0.6	−0.4
Military	2.9	2.8	1.5
MAJOR MARKET SEGMENTS:			
Eating/Drinking Places	4.9	4.8	2.9
Eating Places	5.5	5.5	3.3
Full Menu Restaurants & Lunchrooms	4.4	4.9	2.7
Limited Menu Restaurants	7.3	6.5	4.2
Hotel/Motel Market	4.0	4.6	2.9
Transportation Market	5.9	6.3	5.5
Leisure Market	4.9	3.1	2.7
Retail Market	5.4	7.2	7.2
Business/Industrial Market	1.8	3.4	1.6
Student Market	0.9	−0.5	−0.7
Health Care Market	−2.7	−1.7	−0.4

1. Wholesale food price index will increase at 3.15% compound annual rate for the five years 1984-1989. This is a substantial drop from the 1983-1988 rate of 4.44%. Menu prices will increase at a 4.48% compound annual rate 1984-1989. This is virtually the same rate as the estimate of 4.51% for 1983-1988.

We use compound annual growth rates to express change in our projections because they are mathematically correct. To illustrate, if we multiply the 1984 industry sales total of $163,469,000,000 by the compound growth rate of 7.2 percent (1.072) and then multiplied the result by 1.072 and repeated the process three more times, we would obtain the 1989 result of $231,227,000,000. If the same procedure was duplicated using the average annual growth figure of 8.3 percent (1.083), the result would be a projected sales figure for the industry in 1989 of $243,544,000,000.

**How higher sales values can be generated by how one approaches the data.*

If we adjust our figures to reflect the higher sales values generated by the addition of military troop feeding and school foodservice commercial equivalents and the additional volume in vending categories not originally included, we would show industry sales $18.5 billion higher for a new total of $181.9 billion in 1984. This total is 11.3% higher than our basic estimates. In our view, these adjustments are not valid because they produce a result which is in turn inflated (military and school feeding), and not comparable (candy sales are not included in the Census of Retail Trade's merchandise line for meals and snacks, nonalcoholic beverages and alcoholic beverages).

This summary was prepared by RBI Research and Malcolm M. Knapp, president of Malcolm M. Knapp, Inc., New York. The 1983 sales and purchases data used in this nine major market and 38 sub market growth report were prepared by Mr. Knapp under contract with the National Restaurant Association. Estimates for 1984, and projections to 1989 were prepared specifically for Restaurant Business Magazine.

Separate Eating and Drinking Places

Competition is intensifying as operators search for new niches, explore new profit options, and attempt to diversify.

The dining out market of the mid-1980s is a dynamic one. Consumers are more intrigued than ever by sophisticated, varied menus and dining experiences, while at the same time, increasingly concerned with the more subjective considerations of price/value. Restaurateurs and chain executives are searching for new niches, and competition is intensifying. A number of companies with a few years under their belts are upgrading and repositioning. Many established companies are reaching out for new customers and keeping old ones by diversifying their menus. Still others are attempting to slip in between the cracks by offering specialized or regional favorites.

Operators are exploring other profit options, like breakfast, takeout and catering, and delivery. Healthy and light have become the buzzwords of the '80s, although baked goods, desserts and premium ice creams also have their place—sometimes with the same group that's ordering light. Brasserie menus, offering something for everybody at any time, are hot, and so is the concept of restaurants combining socializing *and* specialty dining. Still big and growing is the gourmet burger segment, but, as industry observers predict, watch for some shake out. Nostalgia is upon the industry, especially '50s concepts and art deco interiors.

Although the industry as a whole is vigorous, the field is crowded and competitive, and the past year has seen some casualties. Kelly-Johnston (a Chi-Chi's and Duff's franchisee); Peoples (a family restaurant chain spun off from Bonanza several years back); Tokyo Bowl (an Oriental fast food concept); and Fresher Cooker (a healthy fast food chain) have all filed for bankruptcy. In fact, the problems of the latter two indicate that Chinese fast food and healthy food may not be all that easy to develop as a chain. Both companies have had problems with consumer acceptance, necessitating significant concept overhauls, and neither has been able to attract and keep franchisees—R.J. Reynolds backed off an earlier franchising commitment with Fresher Cooker. Likewise, Nankin Express in Minneapolis, despite franchising promises from giant International Multifoods, has been disappointingly slow to take flight, despite a number of changes in the concept.

Another company much in the news for its troubles was Diversifoods, which creaked on through a number of management shake-ups, problems with dissident Godfather's franchisees, and a failed attempt at a leveraged buyout before settling on a plan to be acquired by Pillsbury, which beat out Horn & Hardart on a takeover attempt. A planned leveraged buyout of Foodmaker/Jack in the Box from parent Ralston Purina was also scuttled, in late June.

Buy-and-sell fever, in fact, has been very apparent in the industry, as companies seek to diversify their holdings or to retrench where the profits are surest. Saga added eight-unit Spectrum Foods, a specialty restaurant company, to its growing portfolio of restaurant concepts.

Southern Hospitality Corp. divested its eight full-service restaurants in January, preferring to concentrate in fast food. Imasco, parent of Hardee's, has acquired Grisanti Inc., and will expand the Mama Grisanti Italian dinner house concept. And Pillsbury, with obvious confidence in the potential for a national Oriental fast food chain, acquired nine-unit Quik Wok, a San Antonio-based Chinese chain which will be managed by its Burger King subsidiary. General Mills shared that confidence, acquiring the four-unit Leann Chin chain out of Minneapolis. However, General Mills is also selling. The company struck an agreement with W.R. Grace—seemingly always acquisition-minded—for the sale of Darryl's (27 theme dinner houses) and Casa Gallardo (about 25 Mexican restaurants); The Good Earth (General Mills' 47-unit healthy chain) remains on the block.

Collins Foods International has been on a diversification spree that bought it Gino's East, a deep dish pizzeria in Chicago, Josephina's (a California-based Italian dinner house chain) and a 60 percent interest in Ed Debevic's, a joint venture "modern diner" concept with Lettuce Entertain You of Chicago and Phoenix' Big 4 Restaurants. Each is being fine-tuned. Three Gino's have opened since the acquisition. Though different things have been tested in each of the units, the thrust of menu refinements broadens the original restaurant's focus to include more pastas, appetizers, and entrees.

As a result, average checks are higher. Decor refinements also retain the basic concept while broadening the appeal and upgrading the ambience: the new restaurants feature the original's pubby flavor and graffiti-splashed walls, while introducing natural light, attractive furnishings, and other amenities.

Many older chains, in an attempt to renew flagging sales and customer interest, are repositioning. One such chain is Red Lobster. After a poor showing in 1984, the chain of 370 seafood dinner houses is hoping to recover via an extensive remodeling program (which includes, in some markets, exhibition mesquite grill kitchens and raw/seafood appetizer bar in revamped cocktail lounges) and a 100-item new menu featuring market-fresh fish. The company, which is owned by General Mills, has also opened a small, limited-menu cafeteria-style express unit in downtown Orlando, and has reorganized to create a new department charged with researching concept variations to appeal to new markets.

One particularly successful change in direction has been carried out by Sizzler, born in 1957 and being reborn in the 1980s. First indication: the name. Changed from "Sizzler Family Steak House" to "Steak-Seafood-Salad Sizzler" in late 1983, the once-budget steak house concept now features an upgraded decor; a broader menu which includes fresh fish, cut-on-premise steaks, an expanded salad bar and a soup bar. These changes position the chain between the gourmet hamburger/mid-price segment and the casual theme one. In March, the company opened an upgraded unit in Palm

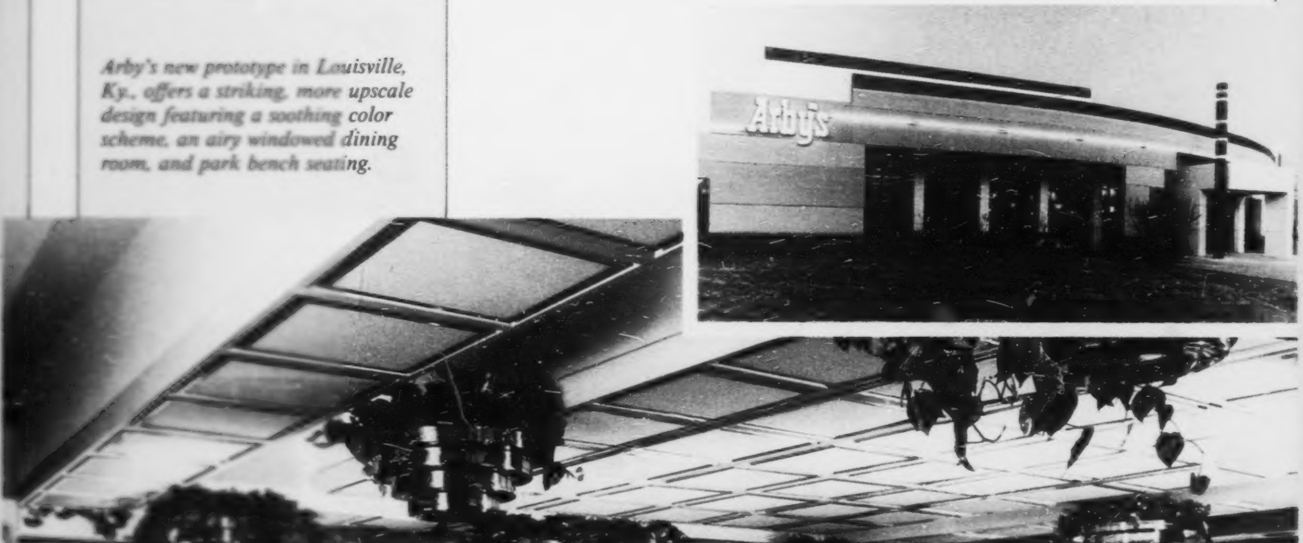
Philadelphia restaurateur Steve Poses' newest restaurant, City Bites, is a trendy bistro offering a casual ambience and diverse menu in a dining area that fits a '50s diner inside a Greek temple structure.

Desert, Cal. (an affluent community near Palm Springs), which features a cocktail lounge, greenhouse seating, and an upscale tropical look with etched glass, rattan, a beamed ceiling and bamboo fans. The unit will generate sales of more than $2 million annually.

New product introductions have become very important in an industry which seems more trend-conscious than ever before. Riding the Americana bandwagon, Bennigan's has introduced a seven-item Creole menu, which includes seafood gumbo, Bayou chicken, and shrimp Creole. Hoping to boost sales on the light side, T.G.I. Friday's rolled out a line of gourmet chicken sandwiches and nonalcohol drinks.

Fast food chains seem to be leading the pack with menu additions, as well as unit upgrades, in an attempt to bring more customers over to their side. Responding in part to pressure from the "gourmet burger" boom (Fuddrucker's, Flakey Jake's, Chili's, et al), several of the burger chains have launched their own, larger versions. Burger King has in-

Arby's new prototype in Louisville, Ky., offers a striking, more upscale design featuring a soothing color scheme, an airy windowed dining room, and park bench seating.



troduced a new Whopper, 0.6 oz. larger than the old one for the same price, with new cheese and a smaller, Kaiser-cut bun. Hardee's too has reformulated its burger, with a thicker patty positioned to resemble a backyard-barbecued burger. And McDonald's is testing—among other items—McDLT, a burger with lettuce and tomato on the side.

The pizza chains are also at the new product drawing board. One of the most interesting and potentially significant is segment leader Pizza Hut's new Priazzo, a two-crusted stuffed pie that is targeted at non-pizza users. West Coast-based Straw Hat has introduced a California-style pizza with vegetable toppings. Pan pizzas and individual pies, targeted at lunch business, remain important. The segment seems divided on the subject of delivery, an issue brought up by the sheer success of Domino's. Straw Hat has more than half a dozen "express" units in test which offer full delivery, and plans to expand the concept. According to Jeff Henley, who oversees Straw Hat for parent Saga, take-out/delivery sales have grown to 50 percent of the total. Pizza Inn, on the other hand, feels that the customer has to be charged more for delivery, and the higher cost is a negative deterrent.

On the chicken front, nugget-mania continues to spread, as Church's, KFC, Grandy's, Bojangles, Mrs. Winner's, and Popeyes have added their versions, usually positioned as a higher quality alternative to McDonald's McNuggets. Church's has also successfully introduced a catfish product, as have Sisters and Long John Silver's. With dinner sales on its mind, Mrs. Winner's is testing baked chicken dinners.

Unfortunately, some chains have

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Chicago's Gino's East has taken its deep dish pizza concept west to Manhattan Beach, Cal., retaining its pub style and graffiti-splashed walls while adding more natural light and more attractive furnishings.

found that menu proliferation is *not* the route to success. Carl Karcher's Carl's Jr. gave up on its attempts to market dinner and is instead focusing on its original charbroiled hamburger. Even McDonald's, which probably tests more products than any other chain, has had mixed luck with new products, such as Chicken McSwiss (a chicken "cordon bleu" sandwich), the cheddar melt sandwich, and the Lite Mac (a lower calorie alternative to the Big Mac).

Breakfast has become a major thrust for nearly all of the fast food chains. Wendy's rolled out a made-to-order breakfast program this summer which includes omelets and breakfast sandwiches on choice of white or wheat toast. BK has rolled out its breakfast, which is based on the croissan'wich. Bojangles has biscuit sandwiches, and Roy Rogers continues to test a serve-yourself breakfast bar on weekends. Meanwhile, McDonald's—which virtually created the daypart for fast food—continues to sell an estimated two million breakfasts per day.

As the fast food segment pushes further and further away from its low-ambience, plastic beginnings, chains are remodeling and developing sleek new prototypes. Taco Bell is proceeding with a program to restyle and "mainstream" its units, expanding dining rooms and adding drive-thru windows. The chain also has introduced a chicken fiesta salad and a Mexican-style pizza. Jack in the Box has tested a new identity, Monterey Jack's, that it hopes will appeal more to young adults.

Among the most striking new designs in fast food is Arby's new experimental prototype, which opened last spring in Louisville. Although Arby's execs have made no determination as to either further expansion *or* modification of the prototype, the new unit is more upscale, featuring a soothing Post Modern rose, mauve, and burgundy color scheme, a dining patio with umbrella tables, and an airy windowed dining room with park-bench seating and high ceilings. Other innovations include an upgraded salad bar, a condiment bar, and an exhibition rotisserie for spit-roasted chicken, now in test.

Sizzler's new upgraded unit in Palm Desert, Cal., which offers table service and a revamped menu, features a tropical look with greenhouse seating, etched glass, beamed ceiling and bamboo fans.

Although the industry as a whole is vigorous, the field is crowded and competitive, and the past year has seen some casualties.

The unit is also a test site for the company's line of 6-oz. hamburgers.

But all is not mass market. Many entrepreneurs are finding success as regional favorites, or by specializing in something unique. For instance, there is Frankly Fries in the Washington, D.C., area, which serves only french fries cut fresh daily on site, all-beef hot dogs, baked potatoes, and beverages. With seven units in operation (and plans to open two more within weeks and another two by year-end), the six-year-old company recently completed a franchising package.

Nipper's is another highly specialized concept, serving champagne and caviar to a well-heeled clientele. There are currently two Nipper's, in Santa Barbara and Beverly Hills, but creators Horatio Lonsdale-Hands and Arthur von Wiesenberger have plans for openings in Chicago and Dallas in 1985, and London, New York, and Houston in 1986.

On a trend basis, healthy and light foods continue to hold interest, a phenomenon which does not necessarily guarantee the health of a "healthy" concept—as Fresher Cooker has proved. On the other hand, last spring Wendy's rolled its Light Menu (salad bar, baked potatoes, diet drinks, and a lower-calorie, higher-fiber multi-grain bun) systemwide to very favorable response. Friendly's launched its new light menu (seafood and tuna salad pita sandwiches and platters, croissant sandwiches, and a seafood platter) this summer with a 20-market ad campaign. Several of Rax' menu items have been endorsed by the American Heart Association. And D'Lites, despite some impatience on the part of Wall Street, has commitments signed for over 200 new units, and should begin flexing its muscles in earnest within the next two years. D'Lites currently has about 70 units open and touts a menu which consists largely of standard fast food offerings, reformulated and packaged to appeal to the health-conscious.

At the full service end of the scale, making a go of healthy food is a little more difficult, and most operators have found that they need to stay away from such designations as "vegetarian," "macrobiotic," and even "healthy." For instance, the $4 million-a-year Unicorn Village restaurant and retail complex in North Miami Beach is positioned as "wholesome and quality," selling fresh seafood, entree salads, vegetarian dishes, interesting pastas, free-range poultry, gourmet baked goods, and the like. Neither red meat nor alcohol is sold. According to owner Terry Dalton, such a menu is the ultimate "yuppie" diet, appealing to self-image as well as self-gratification.

The gourmet burger subsegment continues to see a great deal of activity. San Antonio-based Fud-

1989: $161,793,000,000 +7.5% Compound Annual Sales Growth

Separate Eating & Drinking Place Sales

	1983 Sales ($000,000)	1983 Units	1983 Purchases ($000,000)	1983 vs 1982 % Growth	1984 Sales ($000,000)	1984 Purchases ($000,000)	1984 vs 1983 % Growth	1989 Sales ($000,000)	1984-1989 % Compound Annual Growth: Nominal	1984-1989 % Compound Annual Growth: Real
Separate Eating Places	95,173	254,252	33,117	9.9	104,418	36,328	9.7	153,202	8.0	3.3
Full Menu Restaurants & Lunch Rooms	50,514	123,657	17,890	8.8	55,094	19,512	9.1	78,350	7.3	2.7
Limited Menu Restaurants	39,453	113,110	13,414	11.7	43,674	14,849	10.7	66,780	9.0	4.2
Public Cafeterias	2,864	6,069	1,038	7.7	3,126	1,125	8.4	4,403	7.1	2.5
Social Caterers	1,148	3,570	422	7.5	1,241	456	8.1	1,791	7.6	3.0
Ice Cream, Frozen Custard Stands	1,174	7,846	353	9.5	1,283	386	9.3	1,878	7.9	3.3
Bars & Taverns	8,150	61,289	2,914	3.1	8,248	2,949	1.2	8,591	0.8	−3.5
Total	103,323	315,541	36,031	9.4	112,666	39,277	9.0	161,793	7.5	2.9

New product introductions have become important in an industry that is more trend-conscious than ever before.

drucker's, with more than 70 restaurants in operation, has emerged as a segment leader along with Dallas-based Chili's, with about 50 units. California-based Victoria Station is continuing to convert underperforming boxcar restaurants to its self-service Bonkers gourmet burger concept, but the jury is still out on whether this strategy will turn the company around. To date, only six conversions have been completed.

Certainly, the segment became crowded quickly with players eager for a hot new growth vehicle, and there have been growing pains. T. Twiggs, Greyhound's single-unit foray into the gourmet burger market, is presently up for sale. Flakey Jake's scaled back on its 1985 expansion plans in order to realign management and refine the concept, broadening its menu and reducing prices on burgers in selected markets. However, according to president Bob Luckey, by year-end, there should be 21 company-owned restaurants and up to 40 franchised units, with more rapid expansion planned for 1986. The company has entered several new Midwestern markets and this year will also open in Philadelphia, Charlotte, Charleston, and Atlanta.

J.J. Muggs, a division of S&A Restaurant Corp. (parent of Steak & Ale and Bennigan's) has grown *more* rapidly than initially thought, but the chain has also repositioned into more of a casual cafe concept, featuring "American favorites" such as steaks, pasta, Mexican items, sandwiches, finger foods, and the like, in addition to hamburgers.

The '80s has become a decade of dining as theatre, and many restaurants provide front row seats. Especially in urban areas, restaurants providing splashy architecture—often including exhibition kitchens and luxurious materials—and trendy foods have been popular.

In Manhattan, people come from all parts of the city to the newly hot "Flatiron district" near Union Square to imbibe and graze at a restaurant called America, an airplane hangar-sized place with a bar raised on a dais and lit up like an altar. The 100-item menu features American food, serious and funky: fried catfish, Cajun "popcorn" (fried crawfish tails), Philly cheese steak sandwiches, pastas, alphabet vegetable soup, and tapioca pudding.

In Philadelphia, owner Steve Poses has had interesting experiences with his newest restaurant, a witty, theatrical, "New Wave" bistro called City Bites. Now in its second year of operation, City Bites has also just completed a total menu revamp, to make it more focused and moderately priced. Explains Poses, who also owns The Commissary, Frog, and 16th Street Bar & Grill in Philly: "I wanted a fun, playful restaurant for socializing, like Friday's or Houlihan's, but with gourmet food too. Unfortunately, the original menu was too esoteric—customers didn't know what to make of it." Poses spent several months reevaluating, and ultimately made the menu more casual and less serious, replacing items like warm sweetbread salad with a more prosaic selection of baked brie and the like. Thematically, however, the restaurant remains "pop," with an electronic moving message board delivering one-liners about the state of the world, trompe l'oeil marble set against electric colors and angled black-and-white linoleum floors, and a dining area that fits a '50s diner inside a Greek temple structure. The design is by Edwin Bronstein Associates, a Philadelphia-based architectural firm.

Bistro menus like City Bites' are indeed a big trend. Like the brasseries and trattorias of Europe, these restaurants feature casual ambience and food for any time of day, from a light snack or dessert to a full meal. Grilled foods, pastas, composed salads, specialty desserts and wine-by-the-glass are the hallmarks of a successful bistro menu. Michael Foley, owner of the upscale Printer's Row restaurant in Chicago, opened a more casual, neighborhood-style restaurant called First Street in June. The 130-seat restaurant, located in a resurgent, gentrified area of the city once known as Old Town, features a freestyle menu of boutique pizzas, pastas, daily specials, interesting sandwiches and salads, and specialty desserts. A backroom wine bar with communal tables, like a bierstube, is the centerpiece of an eclectic decor which features elements old and new—a map of old Chicago juxtaposed against a fanciful mural of the Windy City in the 21st Century, hand-laid tile floors against holograms and laser lights.

In New York City, the Manhattan Brewery fulfills the same purpose in that city's life as a pub does in London. Decor centers on the enormous copper brewing vats where five specially formulated ales are produced. A menu of pub food—Scotch eggs, shepherd's pie, oysters and boiled shrimp, a ploughman's lunch (bread and cheese)—is offered.

Take-out and catering are clearly showing themselves to be a boon in today's competitive climate.

The American Cafe, with seven restaurants in the Washington, D.C., area, has developed several million dollars worth of additional business with its adjacent gourmet carry-out markets, and more recently with a full-service off-premise catering program. Morrison's has opened more than a dozen take-out shops, including a new free-standing one in its Mobile hometown. Vicorp is seriously considering launching catering from any number of its dinner house restaurants (which include Hungry Hunter, Carlos Murphy's, and Mountain Jack's) and has acquired the San Diego-based Piret's restaurant/gourmet take-out shop group, which had itself begun a catering service.—**Joan Lang**

The Hotel/Motel Market

The evolution of hotel foodservice continues as many properties aggressively court the local market.

The role of hotel foodservice continues to be redefined as chains and independents invest time and money into tailoring food and beverage outlets to fit local tastes. Although the in-house guest—once the mainstay of hotel foodservice—remains an important customer, hotel restaurants are aggressively courting the area resident.

The impact of custom-designed foodservice facilities is far reaching and the upscale frequent business and leisure traveler is reaping the benefits of this increased attention to food and beverage. Luxury chains (attracting the top seven percent or carriage trade) such as Four Seasons and Trusthouse Forte fine tune menus for greater flexibility. Deluxe and upscale companies including Omni/Dunfey Hotels, Vista International, Stouffer Hotels, and Radisson Hotels are strengthening and/or repositioning themselves in the marketplace with corporate strategies dependent upon "localized" restaurants. Mid-price hotels such as Marriott's Courtyard and Ramada Inn's new home-style concept continue to pare public areas, resulting in downscaled restaurants featuring limited but varied menus. And, Holiday Inns in its bid to streamline operations has decentralized its home office functions.

Aujourdhui is Four Seasons newest restaurant, located in the company's recently opened Boston property. "The restaurant's name means 'today,'" explains Alfons Konrad, vice president of food and beverage for the Toronto-based chain. "Our approach to foodservice is indicative of what our customer wants today: fresh, nutritionally balanced, well-presented and tasty food." And, according to Konrad, the 90-seat restaurant steps away from traditional French food in favor of today's French cuisine and includes nuances of Italian, American, Californian, and Cajun influences.

Not surprisingly, restaurants and bars in luxury properties keep abreast of trends in freestanding establishments. Hotel Plaza Athenee, a Trusthouse Forte property in New York City, caters to the healthy lifestyles of its heavily corporate customer base with the "Le Menu Minceur" offered in Le Regence restaurant. The lunch menu consists of three "light" selections totaling 500 calories for $22.50. At The Drake, a 640-room deluxe hotel in Manhattan's midtown (the first Swissotel property in the U.S.), business travelers, tourists and well-heeled locals enjoy champagne by the glass ranging from $6 to $20 in a newly renovated lobby.

Chancellor's, the upscale restaurant at The Vanderbilt Plaza Hotel in Nashville, TN, competes head on with restaurants in the local marketplace. According to William Shoaf, food and beverage manager for the 342-room hotel, numbers indicate that the 80-seat restaurant is fulfilling its promise—75 to 80 percent of its customers are local residents.

Shoaf defines the restaurant's menu as "Modern American Cuisine," a description which indicates that the menu uses fresh American products rather than showcasing the cooking styles of a particular region.

Omni/Dunfey Hotels are competing for a prized share of the lodging market—the upscale business and leisure traveler. Innovative food and beverage facilities serve a dual purpose. For the company, foodservice operations act as separate profit centers; for the customer, restaurants reflect community tastes. "The hotel guest is no longer our only reason for existence," explains Walter Staib, vice president of food and beverage for the New Hampshire-based chain. "Our food and beverage outlets are geared to be profitable and as a result we cannot be tied to occupancies. We avoid cookie cutter concepts and prefer 'market driven' restaurants patronized by locals."

To this end, Staib and his team spend 18 months to two years prior to opening in developing a facility geared to each market. Emphasis is placed on geographical and demographic data as well as local food trends. For example, at the recently opened Omni International Hotel at St. Louis Union Station (a cooperative venture of The Rouse Company; Oppenheimer Properties, Inc., and Omni International Hotels) foods of

Chancellor's, the upscale restaurant at the Vanderbilt Plaza Hotel in Nashville, Tenn., competes head on with local establishments serving American style foods with emphasis on lighter, healthier dishes.

the American heartland are appropriately showcased at The American Rotisserie restaurant.

With so many chains jockeying for the lead position in the upscale business traveler market there is bound to be a shake-out. However, Staib makes an interesting observation: "Saturation is a point well taken when it comes to rooms. While a city may not be able to support the addition of 300 rooms, there *is* a market for a new restaurant."

Indeed, Fred Rufe, director of food and beverage, planning and development for Hilton International, echoes Staib's sentiments using the Vista Hotel in Oklahoma City as an example. "The restaurant is successful in spite of the depressed economy in Oklahoma City due to the oil glut. The property opened at Christmas '84 and while occupancy is soft, business at The Waterford restaurant is strong."

Activity among Midwest-based chains is frenetic. Ohio-based Stouffer Hotels is geared up for an ambitious expansion program. (See *Restaurant Business*, July 20, 1985.) Contemporary foodservice facilities play an important role in the company's strategy to reposition the chain in the top tier of the hospitality industry. According to Giulio Comacchio, director of food and beverage, Stouffer property's are upgrading older restaurants and developing new concepts.

By March 1987, Minneapolis-based Radisson Hotels will add 15 new properties to its existing base of 49 hotels (33 of which are managed and 16 franchised). This represents 36 new restaurants and bars. According to Don Clawson, vice president of food and beverage for the chain, in 1985 Radissson will spend $9 million on a national awareness advertising campaign targeting the 25 to 55 year old up-and-coming middle manager as well as the top management traveler as its customer base. In order to accomplish this, Radisson features a "collection" concept of five different types of properties: Plaza (top-of-the-line); Suite (deluxe standards); Hotels (geared for conventions); Inns (smaller hotels on the fringe of major markets); and Resorts.

"We believe that the restaurants are our window to the community," he insists. As an example of corporate strategy in action, Clawson uses Thorndike's, the 42-seat "image" restaurant in the recently opened Radisson Plaza Hotel Orlando which features the best of Florida's east/west coast seafood.

There has been much speculation regarding Marriott's wooing of Howard Johnson's whose performance has underwhelmed parent company the Imperial Group.

Discussions regarding the company's fate are currently being held. The three participants (Marriott, the Imperial Group, and New Jersey-based Prime Motor Inns) are tight-lipped about specifics but it is generally conceded that Marriott is more interested in acquiring the restaurants (for the possible expansion of Big Boy) while Prime, known for its successful management of highway properties, is interested in the hotel operations. Imperial, interested in selling the division as a whole, reportedly places the market value for Howard Johnson's at $400 million.

Ramada has shunned its low-profile strategy of late with the introduction of its " new" look which is competitive with Marriott's Courtyard concept. According to the company, the new Inn concept is not intended to replace the traditional Ramada Inn but is designed to complement Ramada's three tier strategy of Inns, Hotels, and Renaissance properties. Designed to strengthen the chain's position in the mid-priced market, the smaller properties (on average 143-rooms and suites) feature residential-style architecture and downsized public space. Restaurants/cafes will provide limited menus in an intimate atmosphere (40-seats) while lounges will adopt a living-room setting.

According to Robert Lansdell, vice president of food and beverage, the scaled down Ramada Inn restaurants eschew the cookie cutter approach of the past. "Today, we are moving away from the Summer-

[illegible] | [illegible]

Hotel/Motel Market: Foodservice Sales

1989: $14,617,000,000 +7.5% Compound Annual Sales Growth

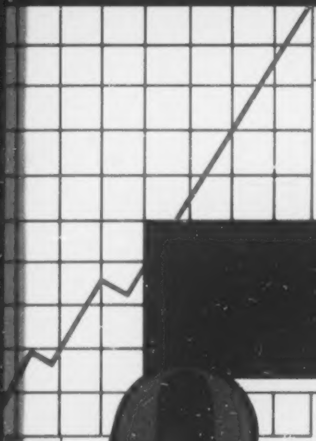
	1983 Sales ($000,000)	1983 Units	1983 Purchases ($000,000)	1983 vs 1982 % Growth	1984 Sales ($000,000)	1984 Purchases ($000,000)	1984 vs 1983 % Growth	1989 Sales ($000,000)	1984-1989 % Compound Annual Growth	
									Nominal	Real
Hotels	6,450	13,906	2,070	8.5	7,024	2,254	8.9	***	***	***
Motor Hotels	1,119	2,435	361	8.4	1,214	392	8.5	***	***	***
Motels	1,791	13,378	592	8.2	1,941	642	8.4	***	***	***
Total	9,360	29,719	3,023	8.4	10,179	3,288	8.8	14,617	7.5	2.9

fields concept and tailoring menus to each market."

Lodging giant Holiday Inns is moving away from the "chain" concept which made the Memphis-based company a hospitality pioneer.

"For years, operators have argued that they are closer to the consumer on a property to property basis," begins Tim Craig, director of foodservice systems. "We agree that the on-site management has a more in-depth knowledge of the area than the central staff and can therefore react faster to trends. As a result, future foodservice concepts will be decided by the properties' management."—**Denise M. Brennan**

At Radisson's Orlando property, Thorndike's, featuring Florida seafood, is an example of the chain's corporate f&b strategy—a flexible restaurant reflecting local tastes.



The Retail Market

Operators of retail foodservice outlets are becoming like the commercial segment—more market-driven and energized.

In the past several years, the retail sector as a whole has been swinging away from the outdated attitude that foodservice is no more than a necessary evil. As a result, restaurants and snack bars in department stores, supermarkets, convenience stores and other retail outlets have become energized by the same feeling of excitement that is sweeping the commercial foodservice sector, becoming more market-driven and marketing-oriented.

Within the department store category—the largest single subsegment with 1984 sales of $986 million—the move is away from the listless tearoom atmospheres and gelatin molds of the past, and towards a collection of pleasing food outlets designed to appeal to shoppers and, hopefully, nonshoppers alike. At the same time, concepts are also being developed with an eye towards supporting the image of the store itself, and profitability is becoming an increasingly important factor.

"We want our restaurants to be more than just fuel stops," says Bob Jones, vice president of foodservice for Neiman-Marcus, the 24-store specialty division of Carter Hawley Hale. "Foodservice has to echo the store environment." Accordingly, N-M's various foodservice concepts cater not only to the stores' affluent target customer, but to the regional preferences of customers.

Moreover, the company is making a concerted effort to enhance profitability by utilizing "down time" (9-11:30 a.m. and 2:30-5 p.m.) to its best advantage. Jones hopes that all N-M stores will eventually provide comprehensive party-planning services and take-out foods for busy two-worker households. Many N-M stores already have Epicurean departments selling gourmet packaged goods, prepared foods, baked goods, and the like. Several N-M restaurants also offer in-house catering for meetings and social events.

There are two advantages to offering such services, says Jones. "There's an opportunity for piggyback sales within the stores. And, I'm better able to justify labor costs, which are the big problem in retail foodservice." Other "add-on" sales builders that have been tested or developed are delivered gourmet hospital trays, executive lunch trays, and take-out picnic baskets.

Alan Reyburn, vice president of restaurant development for Bloomingdale's, believes that "for a restaurant to deserve that name it must offer a certain level of amenities—a varied menu, reasonable prices, gracious service." It is no different for the restaurant in a retail setting, he asserts, backed by the commitment of parent company Federated Department Stores.

Bloomingdale's newest restaurant, the Showtime Cafe in the company's flagship Manhattan store, offers nostalgic art deco decor, creative menus that change daily, all-day dining, wine and beer, and live music or entertainment on late nights, all within a convenient self-service atmosphere. The cafe, in fact, is only one of two such self-service facilities among 40 foodservice outlets chainwide, and because it replaced a traditional full service coffeeshop, it is being watched carefully. Though it has turned off a few old guard customers, however, Reyburn reveals that it instead appeals to a much wider audience.

Last August, Bloomingdale's opened a store in The Falls shopping mall in South Miami (its first location in Florida), a spectacular open mall with a network of lily ponds and natural wood-shingled buildings. There are two restaurant concepts in the store, sharing a common entryway: Express for Fastlane Foods (a 75-seat self-service salad and sandwich bar) and the Sunbeam Grille (a 35-seat, tablecloth restaurant). The Sunbeam, which looks out over the lily ponds, features a sophisticated menu, tableside preparation of certain menu items, and a small fine wine list. According to Reyburn, the Sunbeam does what he wishes all retail foodservice could—it attracts people who are not otherwise in the store shopping.

Within the convenience store subsegment, operators continued to look for new products and services to attract customers and offset increased operating costs. Many convenience store chains upped the ante on fast food programs. In 1984, according to the National Association of Convenience Stores, 95 percent of all stores had microwave equipment—virtually the sole form of cooking in the subsegment—compared with 88 percent in 1983. Eighty-four percent offered fountain drinks in 1984, compared with 66

Convenience stores and supermarkets are upping the ante in their ploy to attract a bigger share of the fast food market.

percent the previous year. Meanwhile, the incidence of non-fast food foodservice dropped among the 20,000-odd stores surveyed; prepared foods dropped to 42 percent from 63 percent, and service deli operations to 22 percent from 35 percent. Fresh and frozen sandwiches and other fast food items are where the growth occurred.

The fast food niche is definitely where the action—and the profits—is. According to Stephen E. Schwitalla, vice president of foodservice for the 3,150-unit Circle K convenience store chain, fast food has grown to 9.1 percent of in-store sales for the year ended April 30, 1985, up from 5.6 percent three years ago. The reason: an overall dedicated effort to position Circle K foodservice directly against traditional fast food. The company now serves its 24-item Deli Fresh line of branded, proprietary sandwiches in all of its stores, augmented by the 12-item line of burritos. In addition, a light line of Deli Fresh sandwiches, all under 300 calories, was recently introduced.

According to Schwitalla, Circle K allocates an astonishing 70 percent of its total corporate ad budget to foodservice, in an industry that traditionally spends the bulk of its budget on cigarets, beer and other "convenience" items.

Coupled with the company's commitment to aggressively targeting growth markets, such as working women, with menu expansion and regional menu options, and the selective addition of seating areas in stores with proximity to volume foot-traffic, fast food is expected to net more than 15 percent of in-store sales by 1990, says Schwitalla.

Southland Corp., the segment leader with more than 7,400 7-Eleven stores, is also into foodservice in a big way. As of year-end 1984, approximately 1,500 units featured freshly prepared deli sandwiches, hot dogs, and baked goods. Newer stores in some markets incorporate the J.T.'s Bakery and Sandwich Shoppe concept, with full-color menu boards, expanded self-serve beverage bars, stand-up tables, and display cases for sandwiches, etc.

Fast food, according to the company, is part of a program to attract new patrons from the 20 percent of the population that rarely uses con-

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At Bloomingdale's South Miami store, one of two foodservice facilities—Express for Fastlane Foods—is a self-service salad and sandwich bar with 75 seats.

venience stores. Plants in Salt Lake City and St. Louis produce sandwiches, burritos, and other food items. New products include a line of croissant sandwiches and French bread pizzas.

Supermarkets, too, are vying for dollars that might otherwise be spent on fast food, not so much by opening separate restaurants—an arena fraught with operating problems—but offering prepared foods for consumption off-premise. According to *Progressive Grocer* magazine, only eight percent of total supermarkets had a sit-down restaurant in 1984, but 60 percent had carry-out service, 39 percent offered hot take-out foods, 33 percent featured on-premise bake-off bakeries and 16 percent had scratch bakeries, 32 percent offered store-made pizza, and nine percent had salad bars. *Grocers' Spotlight* reported that the message at the Food Marketing Institute's 1985 convention was that "in-store foodservice, including service delis and bakeries and foods to go, has matured and is now attacking the fast food industry" for convenience-seeking customers' food dollars.

Many Food Emporium stores in the Northeast feature salad bars, ready-to-cook items such as stuffed raw shrimp and sole, gourmet salads, and other prepared items.

Larry's Brown Deer Market, an independent specialty food store in Milwaukee, features a "gourmet-to-go" deli with daily entrees, fresh salads, and homemade baked goods, and supplies complete multi-course dinners for holidays and special occasions, plus full service catering.

Mixed-use retail complexes are also experiencing growth, as developers seek to foster and exploit the potential of once down-and-out urban areas. The granddaddy of the specialty shopping/entertainment concept, The Rouse Company, continues to sail new waters. The Maryland-based company opened its doors late last fall in Denver at the $330 million mixed-use Tabor Center, which contains a Westin Hotel, two office towers, and about 120,000 sq. ft. of retail and restaurant space. This summer saw the completion of the St. Louis Union Station renovation, a $135 million project with an Omni hotel, railroad exhibits, and retail/restaurant areas. Scheduled to open this month (September) is the second phase of South Street Seaport in Manhattan, with seven restaurants, a 24-hour diner, and a bounty of snack carts and kiosks. A number of projects are slated for the next several years, including specialty malls in New Orleans, Portland, Oregon, Seattle, and San Francisco.

Says Scott Ditch of Rouse: "The concept of dining and shopping in the same location is just in its infancy. The food court is something that we'll see more and more of, especially as operators begin to see the potential for developing foodservice outlets that can stay open beyond shopping hours."

The Levy Organization in Chicago has obviously seen the potential of such mixed-use developments: In April, the company opened a food court called The Great State Fare in conjunction with the new Atrium Mall in the spectacular Helmut Jahn-designed State of Illinois Center. Thirty percent of the total square footage of the specialty retail and service mall is devoted to foodservice, inluding the great State Fare's 14 serving areas: Gourmet Burgers, Big B-B-Q, Stuffed Potatoes, Ole! Mexico, The Salad Bar, and Chicago Pizza are representative of the concepts. More than 5,000 people per day are being served, and Levy projects first-year sales of $5 million.—**Joan Lang**

1983: $4,085,000,000 + 9.8% Sales Growth

1984: $4,549,000,000 + 11.4% Sales Growth

1989: $8,005,000,000 + 12.0% Compound Annual Sales Growth

Retail Market: Foodservice Sales

	1983 Sales ($000,000)	1983 Units	1983 Purchases ($000,000)	1983 vs 1982 % Growth	1984 Sales ($000,000)	1984 Purchases ($000,000)	1984 vs 1983 % Growth	1989 Sales ($000,000)	1984-1989 % Compound Annual Growth	
									Nominal	Real
Department Stores	986	5,202	360	6.7	1,074	392	8.9	1,505	7.0	2.4
Variety & General	313	6,755	112	3.0	328	117	4.8	429	5.5	1.0
Drug & Proprietary	370	6,128	133	3.4	389	140	5.2	412	1.2	−3.2
Convenience Food Stores	778	18,000	267	19.9	997	342	28.2	3,055	25.1	19.7
Other Specialized Retail Stores 1	1,638	20,807	556	10.2	1,761	598	7.5	2,604	8.1	3.5
Total	4,085	56,892	1,428	9.8	4,549	1,589	11.4	8,005	12.0	7.2

1. Other specialized retail stores include: Food stores including grocery stores (excluding food convenience stores), gasoline service stations and miscellaneous retailers (liquor, cigar, etc.).

The Business/Industrial Market

Confident of the need to improve employee dining, B&I operators are stressing service, marketing and merchandising.

Foodservice operators in the Business/Industry (B&I) sector are refining their operations, level of service, marketing and merchandising techniques in an effort to be more like—and more competitive with—their commercial counterparts. As a result of their more aggressive approach to promoting foodservice at the workplace, many B&I operators agree that participation among their clients' employees improved in 1984.

"Our job has changed," says Joe Kingrey, president of ARA Services Inc.'s Business Dining Services division, of his company's bolstered efforts at marketing and merchandising. "There was a time when our attitude was to 'serve' food. Now our job is to 'sell' it."

ARA isn't alone in espousing that philosophy. The great majority of contract caterers and in-house foodservice directors have targeted better participation and sales. In order to do so, B&I accounts have taken on a new air of confidence in both their food and decor packages.

This confidence does not only reach into the white collar market, where much of B&I's growth now occurs, either. Operators in heavy industry plants are undergoing a metamorphosis as well.

"We're seeing a lot of upgrading in the cafeteria environment," says Harris "Bud" Rusitzky, founder and president of Serv-Rite Food Service Corp. "Clients are telling us that they want the place to look totally different than the workplace. They want their place to look more like a restaurant."

Rusitzky says that his blue collar clients are also willing to undergo the expense of a remodeling in many cases. "At General Motors, they're gutting out the whole cafeteria and kitchen area," Rusitzky explains. The Serv-Rite founder says some of his accounts are opting for trendy decor packages with plants, brass railings, and booth seating.

Also proving the point that B&I foodservice is changing, Rusitzky says Serv-Rite is experimenting with mesquite-grilled items this year as well as Cajun specials.

Larry Appleton, foodservice manager for Martin Marietta Aerospace, Orlando, says that B&I foodservice must move away from the traditional straight line cafeteria concept.

"The more variety of items we offer, the better participation we have," says Appleton. The foodservice director says the company's cafeterias offer a minimum of 133 food items per day, including a gourmet burger bar, Mexican bar, ethnic bar, and a variety of others. "The Alternative" is the company's healthy food offering, and according to Ap-

ITALIAN
Food Festival

Canteen has found that its by-the-ounce program is not only popular among its clients, but is also—because it is self-service—a method that keeps labor costs low.

Business and Industry: Foodservice Sales

1989: $12,047,000,000 +6.1% Compound Annual Sales Growth

	1983 Sales ($000,000)	1983 Units	1983 Purchases ($000,000)	1983 vs 1982 % Growth	1984 Sales ($000,000)	1984 Purchases ($000,000)	1984 vs 1983 % Growth	1989 Sales ($000,000)	1984-1989 % Compound Annual Growth	
									Nominal	Real
Contract Feeding in Plants [1] *(Cafeteria primarily)*	2,394	N/A	1,077	6.0	2,574	1,158	7.5	3,503	6.4	1.8
Contract Feeding in Business Offices	763	N/A	343	7.5	825	371	8.1	1,174	7.3	2.7
Internal Feeding—Plants & Business	1,505	3,762	700	3.2	1,609	748	6.9	1,914	3.5	−0.9
Waterborne Employees	262	4,708	157	−4.7	272	163	3.8	333	4.1	0.6
Mobile On-Street Catering	537	N/A	177	7.4	577	190	7.4	829	7.5	2.9
Food Vending Machines *(excluding packaged soft drinks and candy)* [2]	2,860	3,267	915	7.0	3,094	990	8.2	4,294	6.8	2.2
U.S. Defense Personnel	N/A	N/A	1,813	N/A	N/A	1,909	N/A	***	***	***
Food Furnished Foodservice Employees	N/A	N/A	3,776	N/A	N/A	4,050	N/A	***	***	***
Total	8,321	11,737	8,958	5.6	8,951	9,579	7.6	12,047	6.1	1.6

pleton, participation is good.

The Alternative is an extensive program, separate from other service lines and complete with its own cook. Ingredient cards and nutritional information cards are available to employees, who dine on the likes of tabuli and bulgar wheat sandwiches on a whole wheat pita; special salads; whole wheat pizza; baked skinless chicken; and Swiss Alpine apple cabbage soup. Literature on health and fitness is available at cash registers, and 10 scales are positioned outside the cafeteria for weight check-ups.

Choice being such an important element in today's B&I sector, ARA Services has settled on the appropriate name for its B&I program. Called "Choices," ARA's program features a modular menu system with a variety of modules available. "Fresh Start," for instance, is a breakfast module, offering complete breakfasts, and special breakfasts with regional themes—"Alaska Daybreak," which includes salmon cakes, or "Texas Wakeup," which combines elements of Spanish and cowboy-inspired breakfast foods.

Each module is a complete merchandising program," says ARA's Kingrey. "For each module we have separate work manuals, point of sales material, posters, table tents and the like. We've increased sales 25 to 30 percent with the module program, so we're very pleased with it." Other modules include "Kettle Classics," a soup and salad bar; "Salad Garden," with a choice of 12; "Sizzles," for grilled and fried items; "Upper Cuts," for roasted meats; "Deli Corner," and many others.

Kingrey points to the effectiveness of marketing and merchandising as key to successful business and industry operations.

"Merchandising is the name of the game," Kingrey explains. "But you can't just merchandise a poor operation. First, it's necessary to develop a program that will work. That takes a lot of effort but the benefits are really showing up."

ARA, says Kingrey, will increase manual foodservice sales volumes by $30 million this year in B&I.

Hal Ritchie, vice president, director of foodservice for Canteen Corp., says the company will continue stressing low labor cost methods for its B&I accounts. That means emphasis on a by-the-ounce program and Gulliver's deli, both self-service concepts.

Though the company has maintained these concepts the past few years, Ritchie says that Canteen's clients are looking for something more. "This is an area of foodservice where clients can get tired of a concept rather quickly," he points out. "The industry is seeking change. Clients are looking to get a bigger bang for their buck."

Ritchie says he is uncertain of spe-

Many B&I foodservice operators are changing with the commercial segment offering greater variety, upgraded environments, and stronger merchandising.

cific changes Canteen will make in its programs, but does indicate that some are on the drawing board. The company will continue seeking out new white collar accounts, and will hopefully expand Gulliver's—a self-service office building foodservice concept—to 60 units by year-end.

Another contract foodservice concern that will aggressively target the white collar market is Greyhound Food Management. According to chief executive officer Joe Fassler, GFM will seek an acquisition in the white collar market to move more quickly into the market. GFM's customer mix is currently at 70 percent blue collar accounts, 30 percent white collar, schools and colleges. GFM has 90 percent of General Motors' accounts.

According to Fassler, the company will keep its white collar work force separate from the majority of its workers. "We can't allow the blue collar mentality to work on the white collar accounts," he maintains. "We're hiring new people for these accounts, and we'll continue to do so. We're trying to get rid of our image as 'the great blue collar feeder,' he points out."

Fassler says that GFM's sales in 1984 were about $320 million; 1985 sales will be about $350 million.

Interstate United president, Richard Stein, agrees that B&I concerns must diversify their mix to stress white collar accounts.

In order to accommodate that market, Interstate has come up with the "Interstate Express." A modular food concept, the Express can be used in any size facility and can be expanded as needed.

"It's important to be equipped for any kind of cafeteria," says Stein. "Many new facilities can't support massive cafeterias like they used to. The Express is a way for us to fit into many environments."

Stein says that to entice the white collar customer, Interstate has offered the likes of Cajun food and even sushi on occasion. "You can't do that type of thing everywhere, but on the Coasts it can be very successful. Now, we're experimenting with these things in Washington, D.C., and Chicago."

Howard Carlson, senior vice president of Ogden Food Service, says his company remains a white collar concern. He, too, speaks of marketing and merchandising as key elements of B&I foodservice. He says Ogden spends a lot of time developing promotions on a weekly basis. Oftentimes, he ponts out, the promotion will be tied into a product that is new and interesting.

Reflecting on the industry as a whole, Carlson says, "The types of accounts and the ways they're structured is very important today. In general, B&I lends itself best to management fee contracts. I think in the long term, the days of P&L (profit and loss) for B&I is fading."

Jack Galione, president of Corporate Food Services, and a major independent presence in New York, says he sees opportunities in multi-tenant buildings for white collar operators. CFS entered into such an arrangement this year, servicing a suburban office complex with a variety of foods in a food court configuration. Similar locations provide opportunity to B&I operators.

One operator, Dining and Kitchen Administration (DAKA), says it will move ahead with a fast food concept designed for employee cafeterias of both white and blue collar companies. Saying that most cafeterias compete with fast food units, DAKA president Terry Vince believes, "The company's J.P. Swift concept makes employees who are accustomed to fast food feel comfortable staying on the premises."

J.T. Swift, offering everything from breakfast to quarter-pound burgers, chicken sandwiches and nuggets, is a uniform concept from food to packaging, and can be adapted to fit many cafeteria locations.

—Ralph Raffio

UPPER CUTS

ARA Services

Marketing and merchandising special programs, or modules, such as Upper Cuts, Salad Garden, Fresh Starts, Deli Corner, Sizzles, ARA has been able to diversify, increase sales, and maintain interest among employees.

Salad Garden

ARA Services

ARA Services

FRESH STARTS

The Health Care Market

Changes in health care nationwide are forcing foodservice managers to reshape their ideas regarding food which has resulted in a shift from traditional cafeteria service to more innovative profit makers including take-out, catering, and fast food.

Declining government subsidies, an aging population, and continued interest in good health through preventive medicine are key reasons for negative sales growth of percent in the health care segment. As these factors gradually change the profile of health care in the U.S., they also help to reshape its foodservice sector which must shift over from traditional business categories to others that are more responsive to the changing climate.

As producing revenue has become critical to health care institutions—the result of government cost-cutting on reimbursements for Medicare and Medicaid patients' treatment—hospital administrators must find ways of being cost efficient. Foodservice operators, both in-house and contract are, therefore, forced to be more creative in order to bolster sales while continuing to cut overall costs. In other words, to make up for lost revenues from government payments for patient care, health care institutions are looking to other areas to make up the difference, and foodservice is one of them.

In order to generate added revenue, lackluster menus and cafeterias are gradually being altered to more closely resemble commercial food establishments and consumer trends. Catering and take-out is gaining in overall mix, and off-the-street traffic is a big hope. Last month, in fact, McDonald's Corp. opened its fourth hospital unit, at Bethesda Naval Hospital, in Maryland. McDonald's has other hospital units in Philadelphia, Florida, and Phoenix. The Phoenix unit is franchised, and is located on the second floor of the hospital. Company spokesman, Bob Keyser, says, "The units are doing well. We consider hospital locations to be a growing market for us."

Those within the health care foodservice sector view the McDonald's move as part of the process.

"We're seeing a much more aggressive approach to hospital foodservice," says Bob Underwood, of the Maine Medical Center, in Portland. "Fast food's influence is definitely there."

Maine Medical Center has just completed a $700,000 renovation of its cafeteria in order to be more competitive with off-premise foodservice operations. Service area was doubled, a "mini-mart" food court-style area with a variety of different food concepts was also added. Seating areas, points out Underwood, were made to create a more upscale atmosphere. Carpeting was used throughout the seating area, as were oak chairs, new lighting, and other elements.

Underwood, and others interviewed in the segment, believe that health care institutions are more eager to invest in such projects because a better return is anticipated.

"Hospitals are much more aggressive about marketing their services today," says John Metz, president of Custom Management Corp. "Foodservice is an amenity they can promote as part of their total service package. It's a competitive market and every edge can make a difference."

But creative menu merchandising and upgraded decor packages are only some of the ways health care foodservice professionals generate greater revenues. Many operators

In order to generate added revenue, lackluster menus and cafeterias are being altered to resemble commercial establishments.

are diversifying in such a way as to become more broadly defined than just as foodservice managers. Others, though doing similar things, also look to new areas of health care for growth providing dietary services or nutritional expertise at nonhospital locations. Health Maintenance Organizations (HMOs) are gaining in force as preventive medicine centers and all types of services are needed by them.

One area for growth—precipitated by a population growing older—is retirement centers and nursing homes, better known within the industry as "continuing care" facilities. This is a market widely pursued.

ARA Services Inc.'s Health Care Nutritional Services division—renamed to broaden its appeal to more than just hospital foodservice—has established a geriatric business "unit" with the express purpose of securing geriatric accounts. Short of a full division, the unit is now concentrating on the eastern U.S., where a building boom of geriatric facilities is evident.

"We're using this unit to focus on the upscale sector of geriatric care," says John Gamble, vice president-marketing for ARA's Health Care Nutritional Services division. "Very important to this is that we're targeting the 'private pay' people rather than those who are on a fixed program with Medicare or Medicaid."

ARA's decision to go with private pay accounts is an understandable strategic move in the current health care environment and is not unique. As a company, ARA, or any other concern targeting private pay patients, can itself decide what level of service it will offer to geriatric patients. It can do so because its customers are not restricted by Medicare or Medicaid payments. In ARA's case, private pay is even more crucial because the company itself owns many nursing homes.

A pilot program in New York, however, will attempt to open up the nursing home market to Medicare and Medicaid patients. If the program, which requires nursing homes to accept a determined percentage of nonprivate pay patients, is adopted nationally, the result will be much like the Diagnosis Related Group (DRG) program which paved the way for government belt-tightening in hospitals three years ago.

"The New York program would affect us like the DRGs," says Dave Witten, director of health care sales for Canteen Corp. "With cost efficiencies growing in importance, as they would with Medicaid and Medicare patients moving in, the need for skilled marketing and management companies like ourselves becomes greater."

Saga Corp.'s vice president-sales and marketing/health care division, Tony Alibrio, is not concerned that the New York program will spread to other areas, but does say the advent of DRGs has benefitted Saga.

"More hospitals are looking to have contractors to come in as a result of the DRGs," says Alibrio. He adds that Saga's account base increased by 22 percent in the last 12 months. And, though the majority of new business is in large hospital accounts, several have been in the continuing care sector.

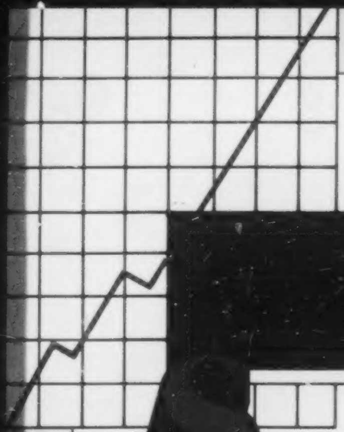
—Ralph Raffio

Health Care Market: Foodservice Sales

1989: $14,016,000,000 +4.0% Compound Annual Sales Growth

	1983 Sales ($000,000)	1983 Units	1983 Purchases ($000,000)	1983 vs 1982 % Growth	1984 Sales ($000,000)	1984 vs 1983 % Growth	1984 Purchases ($000,000)	1989 Sales ($000,000)	1984-1989 % Compound Annual Growth: Nominal	1984-1989 % Compound Annual Growth: Real
Hospital—Internal	7,375	6,828	3,328	−3.5	7,397	3,338	0.3	8,112	1.9	−2.5
Hospital/Nursing Home—Contract	1,034	• 1.	413	4.5	1,118	446	8.1	1,759	9.5	4.8
Other Institutions—Internal *(For specialized care including nursing and old age homes, orphanages, etc.)*	2,794	25,130	1,716	3.3	2,987	1,834	6.9	4,145	6.8	2.2
Total	11,203	31,958	5,457	1.2	11,502	5,618	2.7	14,016	4.0	−0.4

1. Contract units are included in the totals for hospital-internal and other institutions.



The Student Market

Students are "grazing," and their demanding demeanor necessitates food comparable to off-campus facilities.

The warning that college enrollment will soon be down is still just a warning. In five years the prediction will likely come true, but because a higher percentage of high school grads are moving on for higher education and because older students are returning to the classroom, enrollment is temporarily up.

This fall, 12.2 million full- and part-time students will be studying in institutions of higher learning. That's 150,000 more people than colleges had to feed only five years ago, and it's 150,000 more than they'll have to feed in 1990, according to estimates from the National Center for Educational Statistics.

The trend is just the reverse in elementary and secondary schools. Enrollment at these levels has dropped from 46.3 million in fall 1980 to 44.7 million this fall, although this year's figure is a slight rise from 1984's enrollment. The upward swing will continue at least through 1990, as baby boomers have a boomlet of their own, boosting the elementary and secondary school count back up to 45.7 million. By the early 1990s, the NCES projects, school enrollment will surpass that of 1980.

College feeders have found that not only are the nontraditional students more particular about what they eat, but college students of all ages have grown a little more sophisticated in their tastes. Meatloaf with mashed potatoes and canned green beans will no longer do. Students want finger foods, salad bars, pizza, and freshly baked goods. But that's not all they want. They want these options at any eating facility on campus, not just in their dorm's cafeteria, and they want to eat whenever they feel hungry, not just at structured meal times.

Sounds like the "grazing" trend consumers have turned to all over the country. The solution, colleges find, is to compete with the restaurants that meet students' needs.

"It used to be that even community colleges had to offer a complete well-balanced meal. We've convinced administration that serving it to commuting students isn't necessary, that we're better off selling the same foods available off-campus at national chains but for a better price," says Harris "Bud" Rusitzsky, president of Rochester, NY-based Serv-Rite Corp. "We've got kids spending more money now that we sell trendy foods such as chicken wings, pizza, croissants, brioches, and fast food style burgers."

"Price is key," warns Kenneth R. Davidson, vice president—director of food services for Chicago-based Canteen Corp. "Students are watching their dollars. We find that more students are using campus facilities because the cost of eating off-campus is prohibitive and they can get the same foods on-campus."

Looking to increase its business with commuting students and simultaneously stimulate interest from board students, ARA Services has imitated retail and B&I foodservice by introducing a food court concept for student unions. Anywhere from one to 10 concepts can be installed on a given campus, so although the concepts work well together each was designed to stand on its own as well. Concepts include Itza Pizza, El Pollo Grande, Gretel's (a bakery), Sizzles (an upscale grill), Salad Garden, and Bagel Wagon, which along with a hot dog cart called La Carte, takes another form elsewhere on campus. ARA had the carts built last year, furnished them with promotional packages, and began using them as auxiliary foodservice locations. Both carts feature name brand foods and they bring in from $400 to $700 a day in sales.

Realizing the need to increase profits, college foodservice operators are stepping up their catering services. Through catering, they can capitalize on the equipment, labor, and purchasing power they already have. "Catering is such an important part of what we do that we've recently put together an entire training program for managers on how to market catering," says Carl Del Villaggio, vice president—sales and marketing for Saga's educational foodservice division. The educational package is one of 10 the Menlo Park, CA-based contract caterer offers to college foodservice.

Campus bars/taverns are the most sensitive issues for college feeders today. As more states raise their drinking age (to as high as 21), colleges are looking to alternatives to the Rathskeller-type concept.

Custom Management dealt with the problem at one of its accounts by making its Rathskeller a daytime meeting place for graduate and commuting students. By having sand-

In response to the problem of drunk driving and higher drinking ages in many states, colleges are developing alternatives to the Rathskeller pub style concept.

wiches and hot entrees accompany wine and beer on the menu, the caterer developed a "watering hole" into a sophisticated snack bar.

Foodservice operators in elementary and secondary schools are facing a major political issue: the government is proposing to cut its 12 cent per student per day meal subsidy. Convinced the subsidy is an unnecessary gift to children of acceptable financial means, the government sees its elimination as a way to reduce the federal deficit. School foodservice operators see otherwise. Students of families near or below the poverty level receive free or reduced lunches and that will continue regardless.

"To compensate we would have to price ourselves out of business," claims Nancye Perry, president of the American School Food Service Association and manager of food services and nutrition education for the Hartford, Connecticut, public schools. She insists that even a compromise under consideration—to reduce the subsidy to five cents—would be detrimental. Perry points out that when in 1981 the government decreased funding for student lunches prices went up and the schools lost 3 million children a day to other options (brown bag lunch).

The last few years "Offer vs. Serve," whereby schools get subsidized if a student chooses three of five food categories, has reduced waste and increased interest in high schools; to a limited degree it has worked in elementary schools.

The problem with increased prices, especially at the secondary levels, is that students will choose to eat off schools grounds if they can get the same meal for the same price. The solution for many has been to offer a competitive selection of foods and to merchandise them. "Potato bars, ice cream bars, and contests for a free lunch are some of the ways I've maintained student interest," says Clythera Horning, foodservice director of Clearfield, Pa., schools.

Jack Koser, foodservice director of the Lower Merion School District in Amore, Pa., an affluent area, has taken variety to its limit. High school students have the choices of standard entrees plus salad bar, fast food, grilled cheese, steak sandwiches, hoagies, pizza, chicken nuggets, quiche, stuffed potatoes, burritos and croissant sandwiches. Pencils and erasers, and scratch card games are some of the marketing tools he uses.

In order to cut costs, more school districts are bringing in the services of contract caterers who have greater purchasing power and other financially beneficial attributes. Some of the caterers are avoiding the segment, however, because the government mandates that they rebid for any account after three years.

Philadelphia-based ARA further lures districts with educational materials for teachers and students. "We try to teach nutrition to elementary school students hoping they'll carry that knowledge with them as they get older and home to their parents," says Jim Haas, president of ARA's school nutrition services division.—**Rona Gindin**

[illegible]

1989: $9,683,000,000 +3.8% Compound Annual Sales Growth

Student Market: Foodservice Sales

	1983 Sales ($000,000)	1983 Units	1983 3 Purchases ($000,000)	1983 VS 1982 % Growth	1984 Sales ($000,000)	1984 Purchases ($000,000)	1984 VS 1983 % Growth	1989 Sales ($000,000)	1984-1989 % Compound Annual Growth	
									Nominal	Real
School—Internal *(Public, parochial, elementary & secondary) 1*	2,577	90,979	2,854	4.6	2,618	2,899	1.6	2,770	1.1	−3.2
School—Contract	762	• 2	303	5.9	789	314	3.6	1,032	5.5	1.0
Colleges, Universities—Internal	2,931	2,600	1,310	5.3	3,066	1,370	4.6	3,855	4.7	0.2
Colleges, Universities—Contract	1,494	• 2	479	6.2	1,572	504	5.2	2,026	5.2	0.7
Total	7,764	93,579	4,945	5.3	8,045	5,087	3.6	9,683	3.8	-0.7

1. Actual cash receipts from children.

2. Total unit count is given in the internal total.

3. Not including $853,764,240 worth of commodities and milk— a +1.5% increase from 1982.

The Leisure Market

The key issue to affect this market segment is the public's concern with drinking and driving.

Leisure foodservice operators continue to report widespread health in 1985. RGI figures indicate that overall growth is up from last year. Sales growth for 1984 over 1983 was 7.3 percent. Total sales for 1984 were $4.8 billion. As a whole, the outlook is positive, with a compound annual growth rate of 7.3 percent projected for 1984-89.

The leisure segment encompasses a broad spectrum of operations ranging from theme parks to stadiums, museums, and resorts, so it is hard to generalize about activities. In many small theme parks and other leisure operations, foodservice activities do not change much from year to year. Sales are affected by attendance, and customers are viewed as a captive audience.

This year attendance has generally been good, because there have been no major weather disasters or strikes—such as the 1982 football strike and the 1981 baseball strike—and this season's feared baseball strike lasted only two days.

The most important development that has affected the leisure segment in many years is the public's increased concern about drinking and driving. Although bartenders and concession stand operators serve only about a quarter of the alcohol consumed in this country, they are a primary focus of the crusade against drunk driving.

Incidents of violence have also brought concerns about drinking at sports stadiums and arenas sharply into focus, and contract caterers and concessionaires are taking decisive action to curb over-indulgence.

Recent news reports of a shooting at Yankee Stadium, rioting and deaths at soccer matches in Europe, and a fight at Anaheim Stadium (in which a member of the California Angels' baseball team jumped into the stands to protect his family who were watching the game), have sharply underlined the potential for explosive violence inherent in a volatile sports setting.

Dram shop laws are the main impetus for implementing alcohol-control programs at stadiums and arenas. "The insurance industry is saying that the social cost to society of excessive drinking is very high," says Jim Peters, executive director, Center for Responsible Hospitality Management. "They are spreading the cost around by bringing the liquor and hospitality industries into the picture."

Traditionally, society has turned a blind eye to the excessive drinking that goes on at sporting events. The drinking is to be expected, in one sense it is part of the sporting mystique. That is changing with changes in demographics, points out Peters. "The baby boomers are having children, and there's a notable emphasis on men being more involved in child-rearing. When a man was single, going to the ballgame was a chance to go out and get drunk," he says. "Baby boomers' perspectives have changed as they have had children, and a sporting event is a good place to take the kids. They don't want to worry about taking the whole family to the stadium."

One company that has implemented a comprehensive alcohol awareness program is Buffalo, N.Y.-based Sportservice Corp., a nationwide concessions company with operations at stadiums, convention centers, etc. The program includes a six-hour training seminar for all liquor servers, conducted by the corporate training staff.

"We try to teach the servers to slow down or stop service before the customer is obviously drunk," says vice president of communications Sam Gifford. "We teach them to look for signals such as loud talk and drinking too quickly. Then we teach them to handle the situation diplomatically, by offering a food substitute or a nonalcohol drink."

Gifford notes that Sportservice has added mocktails (such as a margarita without the alcohol), low and nonalcohol beer, and low-alcohol wine to the drink menu.

The trained servers are supported by a variety of banners, posters, counter cards, program ads, and buttons that display the campaign slogan, "Drink responsibly. Sobriety is no accident."

Also mounting a comprehensive alcohol awareness plan is Harry M. Stevens, a New York City-based concessionnaire that provides food for 45 ball parks, arenas and race tracks, primarily in the Northeast.

As in the Sportservice program, a training team from headquarters is visiting locations training alcohol servers how to gauge signs of intoxication and how to refuse further service. In addition, servers have a wal-

Incidents of violence during sport events has brought public drinking into focus and operators are taking steps to curb overindulgence.

let-sized card containing a blood alcohol chart and "Guidelines for Responsible Service."

Management thoroughly supports the program, reflecting its perceived importance, says Keith Hoyt, director of training. If a customer who has been refused service is belligerent, management intervenes.

Additionally, alcohol awareness is being promoted through the use of new cups with the message "The Pros Know Their Limits—Please Don't Drink and Drive." A public service announcement is being developed to be shown on video monitors at different stadiums and race tracks. At some locations, says Hoyt, more drastic measures have been taken. Alcohol vending has been eliminated entirely at the Meadowlands Sports Complex, East Rutherford, N.J. At every location, alcohol sales are cut off after the third quarter or the seventh inning.

Canteen Corp., a nationwide concession company with $1.3 billion in total sales and concessions at such sites as the Hollywood Greyhound Track, Aloha Stadium, Yankee Stadium, and the St. Louis Arena, also is in the beginning stages of developing a program to control liquor sales, according to Craig Trimble, Canteen's eastern regional manager.

"We teach servers to look for slurred speech, odd behavior, rowdy behavior, and problems with making change," Trimble says. "In the past we told servers to refuse sales, but now we are suggesting alternatives such as another food or beverage. In the past, we always have taken a negative approach. Now we are being more positive and appealing to people's sense of responsibility."

Throughout the leisure segment, another important trend is the upgrading of foodservice. Customers are no longer viewed as a "captive audience" who will eat whatever is available. Whether it be sports stadiums, race tracks, or theme parks, the food setting is being improved.

At arenas and stadiums, food is no longer confined to just hot dogs and popcorn. "We now serve wine, gourmet burgers with toppings such as bacon, cheese, and mushrooms, and a variety of toppings on frankfurters," says John Roberts, vice president of marketing for Harry M. Stevens. He adds that at racing facilities, where activity is more leisurely and patrons stay on the premises for a time between races, foodservice has been upgraded even further, with much more complex menus available. A popular approach is a theme area, with kiosks offering a variety of foods from pizza to linguini with clam sauce.

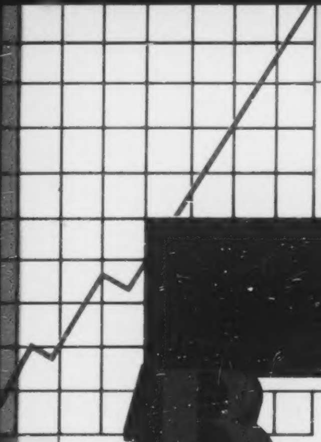
In all leisure areas, there is an increased emphasis on the price/value relationship instead of just price. As in most areas of foodservice, people are willing to pay a bit more for quality.

Larry Slocum, director of food operations for Disney's Magic Kingdom and the Epcot Center, finds this to be true. At the Disney theme parks, foodservice is an even more crucial part of the mix than at other theme parks, so executives are particularly attuned to trends. They find that theme park customers want the same things that the larger population wants; more seafood and more Oriental food. Epcot Center is opening the Lotus Blossom Cafe, serving Chinese fast food, and the Nine Dragons, a full-service restaurant, in the park's Chinese Pavilion. A seafood restaurant, Coral Reef, will open as part of the Seas Pavilion in January.—**Jacque Kochak**

Leisure Market: Foodservice Sales

1989: $6,870,000,000 +7.3% Compound Annual Sales Growth

	1983 Sales ($000,000)	1983 Units	1983 Purchases ($000,000)	1983 vs 1982 % Growth	1984 Sales ($000,000)	1984 Purchases ($000,000)	1984 vs 1983 % Growth	1989 Sales ($000,000)	1984-1989 % Compound Annual Growth	
									Nominal	Real
Theme Parks, Arenas, Stadiums, & Tracks	2,088	N/A	720	11.5	2,224	767	6.5	3,132	7.1	2.5
Drive-In Movie Theaters	232	2,882	72	7.3	252	78	8.6	376	8.3	3.7
Bowling Lanes	677	3,933	242	4.9	712	254	5.2	968	6.3	1.8
Summer Camps & Hunting Facilities	119	2,249	72	3.5	127	77	6.8	168	5.6	2.1
Clubs	1,391	10,310	582	9.1	1,520	636	9.3	2,226	7.9	3.3
Total	4,507	19,374	1,088	9.3	4,835	1,812	7.3	6,870	7.3	



The Transportation Market

By air, sea, or highway, more Americans are travelling forcing feeders to find their competitve niche.

As more Americans take to traveling, more competition is being felt in the transportation sector of the foodservice industry. While heavy players like Dobbs House, Marriott/Host, and Sky Chefs vie for the business of a deregulated airline industry—whose lower fares mean more passengers, but tighter budgets—smaller operations, including some run by the carriers themselves, are also able to compete and grow. Even the bus companies, beleaguered by the discount air travel boom, are finding niches where they can thrive. And more than one foodservice company is firmly grounded alongside the nation's highways, where truckstops and tollway foodservice are both gaining new momentum.

Marriott Corporation, the largest in-flight caterer in transportation foodservice, has been making a lot of acquisitions. In the past year, the company has snapped up Service Systems, Gladieux, and Roissy Service as well as three California hub catering operations. The company, which now operates more than 80 flight kitchens internationally, was also prompted by the highly competitive environment to consolidate domestic and international management operations early in '84.

The second-largest airline caterer in the U.S., Sky Chefs has added flight kitchens in Texas and Oklahoma; has expanded its Dallas, Los Angeles, and Denver operations; and is rehabbing its Tulsa flight kitchen.

The third-largest airline caterer, with a 20 percent share of the market, is Dobbs House, operating more than 50 in-flight kitchens around the country and the world. Among these is a joint venture with Singapore Airlines in the Philippines. Dobbs House has also generated additional business by providing menu consultation services for airlines such as People Express and Air Atlanta, and is testing executive aircraft catering.

Another major player in airline catering is Ogden Food Service Corporation. In 1984, the company acquired six additional flight kitchens, which are expected to generate $40 million in annual revenues.

Republic Airlines operates a flight kitchen in Minneapolis and may add at least one more. Director of foodservice Jim Jette says that a wine-tasting program now offered on about 20 flights has proved very successful.

Despite a pilots' strike, United Airlines remained aloft this spring. The air carrier, which caters about 20 percent of its own flights, has also scored a coup, taking over Pan American's link to the Pacific Basin.

At press time TWA was still in the throes of a takeover struggle between Texas Airlines and Carl Icahn. TWA, which caters about 20 percent of its own flights, has geared two foodservice programs to the frequent traveler. One is the Wine Masters Series, a tasting program. The other is Menu a la Carte, an in-flight meal service offering a wide selection of entrees.

For Chef Aire Airlines Caterers, a small company based at the Islip, N.Y., regional airport, the key to success has been a location slightly off the beaten path. Among its clients are United, Eastern, American, and USAir. In two years, Chef Aire's annual sales have grown to approximately $1 million. The company also has locations at JFK and Albany, and plans to expand into the Providence, R.I., market.

Expansion is helping companies keep pace with the burgeoning U.S. travel market, which grew 8.2 percent in 1984, to $234 billion. According to estimates by the U.S. Travel Data Center, $54 billion was spent by travelers on food in 1984 and $35 billion was spent on lodging.

This boom has been felt by the Port Authority of New York and New Jersey, which has commissioned a strategic plan to study services at three major airports.

Newark International Airport is considered the fastest-growing airport in the country, largely thanks to People Express. This burgeoning "no frills" air carrier has made its reputation on reduced fares, charging passengers for food and beverage served on board. Rapid expansion—including the addition of flights to the West Coast, London, and, most recently, Brussels—is prompting a move by People out of Newark's North Terminal and into Terminal C, a newer, larger facility. The carrier also now offers first-class service.

And now, a new airlines is getting off the ground—Presidential Airways. Serving the Northeast, the Southeast, the Midwest, and Florida, Presidential Airways is positioned as a full-service carrier flying at discount prices. Presidential Airways is working with Marriott to offer unusual and innovative in-flight foodservice, even on short hauls. Based at Dulles Airport, near Washington, D.C., service is expected to begin in October.

Because of hubbing more people are spending more time at airports, explains Art Spring, senior vice president of corporate development for Host International. "If we don't bring the facilities to them, we lose the revenues."

In addition to small, efficient concourse operations, Host has been introducing scatter-station cafeterias at a number of terminals, including the brand-new one at Standiford Field in Louisville, Ky. Moreover, the company is carving a market niche for destination restaurants in airports, positioned to compete with local establishments in both price and culinary quality.

With more and more business travellers being pressured to cut travel expenses, broadening one's market base has become a prudent strategy for some companies.

As air travel in this country soars to new highs, how are things on the ground? Despite a recent announcement that Greyhound lines will be dramatically cutting back on bus operations, Joe Fassler, president of Greyhound Foodservice Management, is optimistic. GFM now operates eight truckstops in the U.S., which offer foodservice, lodging, and shopping, and show average annual volume of $12 million. And 29 of the company's Post House cafeterias in major urban terminals have been converted to Burger Kings, which have been reporting exceptionally high volumes—$3 million for a unit in Chicago. At Burbank Airport in California, GFM's contract feeding division now handles catering for Continental Airlines and Air Alaska. The company projects $200 million in transportation foodservice sales for 1985.

With 28 bus terminal foodservice operations, Trailways has also moved into fast food, with three Hardee's and one Church's showing exceptional volumes in its terminals. In May, McDonald's opened 10 units in one day along the Connecticut Turnpike. With a total of 20 toll-road units expected to generate revenues of $30 million in 1985, McDonald's says average annual volume in these rehabbed restaurants has grown by 400 percent. Like GFM, McDonald's has ventured into truckstop operations, combining McDonald's with a service station and a convenience store.

Marriott has been steadily converting its 22 units along major toll-roads in New Jersey and Delaware to Big Boys and Roy Rogers and units that combine both concepts under one roof. The company also operates units along the Indiana Turnpike, and is hoping to expand as bids come up in Ohio, New York, Florida, Indiana, and Pennsylvania.

Amtrak's trains offer three levels of foodservice—snacks, club, and dining car service. According to Amtrak foodservice director Henry Kabel, of Amtrak's 24 million passengers, an estimated 60 percent dine while on board, generating $38 to $48 million in annual food sales. But Kabel cautions: "We have a $700 million total budget that Congress wants to cut by 10 percent. If so, that's also going to mean a 10 percent reduction in foodservice."

—Mary Timmins

Transportation Market: Foodservice Sales

1989: $4,155,000,000 + 10.2% Compound Annual Sales Growth

	1983 Sales ($000,000)	1983 Units	1983 Purchases ($000,000)	1983 vs 1982 % Growth	1984 Sales ($000,000)	1984 Purchases ($000,000)	1984 vs 1983 % Growth	1989 Sales ($000,000)	1984-1989 % Compound Annual Growth	
									Nominal	Real
Air & Rail *(in transit)*	1,226	98	600	13.0	1,366	668	11.4	2,362	11.6	6.8
Terminal Facilities	604	269	211	9.8	658	230	8.9	987	8.4	3.8
Highway *(Interstate)*	326	N/A	116	8.6	359	127	9.4	530	8.1	3.5
Passenger & Cargo Ships	153	55	84	14.6	172	94	12.4	276	9.9	5.2
Total	2,311	422	1,011	11.5	2,555	1,119	10.6	4,155	10.2	5.5

Military

Competition is moving on to military bases in the form of fast food franchises, but not without controversy.

In the word of great French general Napoleon Bonaparte: "An army travels on its stomach." Little wonder, then, that America has created such an elaborate and ambitious series of systems for feeding its military personnel in Army, Navy, and Air Force installations worldwide.

According to estimates by the U.S. Defense Personnel Support Center (DPSC), America will spend $1.7 billion feeding her troops in 1985. And these are just appropriated funds, which do not cover the military's network of clubs and concessions, nor the franchised retaurant operations that may promise a new, high-volume growth market for fast food chains.

Though the Department of Defense (DOD) monitors budgetary and menu guidelines for all military foodservice operations, the Army, Navy, and Air Force each maintains its own network of mess halls and other troop feeding programs. Challenges for all three include staying within the DOD budget (which now stands at approximately $3.60 per person, per day); keeping up morale—a major military concern in which foodservice plays a vital role; enhancing and promoting nutritional awareness; and improving the feeding of troops in the field and in ships at sea.

The Navy Food Service Systems Office maintains 132 general messes worldwide, as well as foodservice operations aboard almost 250 ships, ranging from aircraft carriers to submarines. According to Lt. Cmdr. John Leon, SC, USN, who serves as financial division director, "Submarine food is known as the best. The ships get an extra allowance because food is a very high morale factor."

Nutrition has become a top priority for the Army, according to Loraine Salerno, supervisory home economist for the Dietary Programs Division. The Army, which runs approximately 1,100 dining facilities around the world, has begun monitoring the calorie, fat and sodium content in the foods served in its mess halls, where 1,500-calorie meals are now available through a new fitness program.

Another important concern for all three branches of the military is the development of food technology and rations, particularly for the feeding of troops in the field. Natick Laboratories, located in Natick, Mass., has produced a major innovation in this area—tray packs. These are approximately as large as a half-size steamtable tray and hold from 12 to 25 meal servings.

Overall, Air Force facilities serve 987 million meals per year at 184 bases, with a total budget of approximately $385 million.

For military men, officers' and enlisted men's clubs have long been a haven for eating, drinking, and making merry after a hitch in the field or at sea. While these clubs are typically required to be self-sustaining—with minimal profits put back into operations—some government funding is used to cover fixed costs. The Navy runs more than 350 such clubs worldwide, with total food and beverage sales of $186 million in fiscal '84. An aggressive campaign to boost awareness of the problem of DWI (driving while intoxicated) was launched to coincide with the 1984 holidays. The program has prompted various promotions as alternatives to alcohol consumption.

The competition appears to be moving on-base as well—in the form of franchised restaurant operations. Burger King, Pizza Inn, and Popeyes have each signed the Army Air Force Exchange Service (AAFES) as a franchisee. While the Popeyes and Pizza Inn agreements are basically one-unit trials, the Burger King contract calls for AAFES to open 185 units worldwide over the next five years. Six have opened already and both average monthly sales and profitability have proved exceptionally high. Meanwhile, McDonald's has signed on as a concessionnaire of the Navy Resale and Services Support System Office (NAVRESSSO), and expects to open up to 300 franchised units on Navy bases around the world over the coming decade.

With AAFES and NAVRESSSO putting royalties from such ventures back into recreation and other funds, franchising may well prove as rewarding for the military as it is for the fast food chains involved. However, an amendment to the Defense Department Authorization Bill has placed a moratorium on future franchising activity on military bases, to be in effect through May 1, or until DOD can assess the economic impact of such operations.

—Mary Timmins

18th Annual Restaurant Growth Index

by Jeffrey Hall

Eating place sales grew by 66 percent in the five-year period 1977-1982; in comparison, retail sales in general increased by only 49 percent.

Will the foodservice industry continue to hold its place as one of the most vital segments of the American economy? What changes in how Americans live, work, and play will have an impact on the industry? Where are the new opportunities for growth?

No single article or set of statistics can answer those questions completely. But data recently made available by the U.S. government—and summarized in this article—provide information that can show us something about the overall state of the restaurant industry as we enter the second half of the 1980s. If we understand these facts, and apply our understanding through use of the specific market information given in detailed tables for each Metropolitan Statistical Area (MSA) that follows this discussion, we'll be much better equipped to meet the challenges posed by an increasingly competitive industry.

The Metropolitan Statistical Area tables that start on page 200 tell you how likely the consumers in each market are to patronize restaurants (the Restaurant Activity Index—RAI) and how well the supply of restaurants meets the demand for dining out in each area (the Restaurant Growth Index—RGI). Careful estimates of population, sales, and market share are also presented.

The earlier description of the foodservice industry as one of the most vital segments of the economy is supported by data from the Census of Retail Trade. This government census, taken every five years, allows us to compare data from 1982 with similar figures from 1977. We learn that retail sales in general increased by 49 percent over that five-year period, but that eating place sales grew by 66 percent. The only major retail segment which grew at a greater rate was gasoline service stations, at 76 percent. By contrast, food store sales increased by 57 percent, greater than the overall retail growth, but behind the eating place growth rate. Fast food establishments increased their sales by 82 percent to spearhead the industrywide growth, while traditional dining establishments swelled their sales totals by a healthy 71 percent. The only pessimistic note is sounded by taverns and bars, which increased their sales by only 24 percent.

Evidence for the impact of the convenience-oriented lifestyles comes from another government survey, this one revealing how households or "consumer units" in urban areas spend their money. The most recent data concern expenditures during 1980-81; comparable information is available from 1972-73. Of course, much of the increase in expenditures between the early '70s and the early '80s should be attributed to inflation, but the comparison of different types of expenditures still reveals a shift in consumer behavior. Consumer expenditures on "food away from home" rose by 125 percent between the two surveys. Of major specified categories, only alcoholic beverages, which rose by 215 percent, and gasoline and motor oil, which rose by 191 percent, increased more.

The picture of the increasing willingness of consumers to apportion a growing part of their food dollars to the restaurant industry is buttressed by information from the U.S. Department of Agriculture. A recent USDA statistical bulletin shows that in 1983, 4.5 percent of consumer disposable income was spent on food away from home. This represents 28 percent of the disposable income spent on food. Ten years earlier, 3.9 percent of disposable income came to the foodservice industry, representing only 24 percent of the food dollar. This increase came in the face of a greater jump in prices for food away from home: A $10 meal in a restaurant in 1967 rose in price to $32 by 1983, while only $28.20 was needed to purchase the amount of groceries in 1983 that could have been purchased with $10 in 1967.

These statistics, when analyzed in conjunction with the retail sales data given earlier, suggest that the last few years have been good ones for the foodservice industry. The quality, convenience, and value offered by the foodservice industry are encouraging the consumer to make the choices that the statistics indicate—to devote a larger portion of the food dollar to food away from home. Each restaurant competes not only with other restaurants, but also with the consumer's option of not dining out at all.

One oddity in the information we've been examining

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so far in this article is the slow growth of sales figures in taverns and bars contrasted with the huge increase in rate of consumer spending for alcohol. A full-scale study would be necessary to account for this apparent discrepancy, but some explanations are evident. First, recent increases in the drinking age, crackdowns on drunk driving, and publicity about alcohol-related traffic accidents may be shifting the site of much alcohol consumption from the local tavern to the home, and thus shifting some of the increases in liquor expenditure from the bar owner to the liquor store owner. Secondly, some of the alcohol consumption may be switching from mixed drinks consumed in taverns to wines enjoyed with dinner—indeed, a portion of the increase in consumer expenditures for alcohol is probably coming to the foodservice industry.

Other information available from the 1982 Census of Retail Trade allows us to review the overall situation in the foodservice industry. In totalling the restaurants, lunchrooms, fast food establishments, cafeterias, contract feeding businesses, and caterers, the census counted over a quarter of a million "Eating places" with payroll in the United States. The total sales of these businesses came to over $93 billion; they employed over 4.3 million workers and paid them nearly $24 billion in wages. These statistics reveal the immense contribution the foodservice industry makes to the nation's economy. To translate them into information that is more pertinent to the individual restaurant owner or manager, let's examine *Table 1*.

This table shows us that the average restaurant in 1982 enjoyed sales of $383,680. Because this is a national average generated from a statistical survey, the figure should not necessarily be used to measure your own success—the average says nothing about regional differences, costs, or profit. But as a general yardstick, it does give you something with which to compare different types of businesses to illustrate the competitive challenge the foodservice industry faces. If we match the sales per employee data in *Table 1* with similar data for other businesses, we can document just how labor-intensive foodservice is. In *Table 1*, we see that restaurants average $20,523 in sales for each person they employ, and that the average sales per employee for all retail businesses is much higher at $71,817.

There are several reasons for this. First, some retailers are selling more costly items that consumers purchase on an occasional basis. The prime example of this is automotive dealers, whose average sales per employee total $181,466. A second factor comes from the level of customer contact. In many general merchandise or department stores, the customer does not encounter a store employee until he or she is ready to pay for the selected items. In these stores, the average sales per employee are $65,218. At an increasing number of gasoline service stations, the customers pump their own gas and pay the single attendant who tends only to the cash register. Average sales per employee in gas stations are $156,846.

By contrast, in the foodservice industry, each customer visit may involve a host or hostess, a wine steward, a waiter or waitress, and workers who bus the tables, prepare the food, and wash the dishes. Even in a fast food setting, the number of workers who have some sort of contact with each customer is considerable.

For comparable averages to those of the foodservice industry, one must turn to other high-contact, labor intensive businesses such as retail bakeries ($22,322 per emoployee), hotels ($31,423), and motels ($27,322). The American consumer whose food dollar is going more and more to the foodservice industry is not simply buying food—he or she is buying service and convenience as well. The methods for increased sales per employee that are seen in, for example, the automotive or general merchandise fields are simply not available to the foodservice operator, for these would diminish the service and convenience that are part of the industry's strength. This fact is part of the challenge the foodservice industry faces, but it is also part of its success over the past decade.

Who are the consumers who are posing this challenge and whose increased reliance on the foodservice industry is spurring this success? What are the demographics of the market? One crucial factor is, of course, income. The past 15 years have seen a sharper line of division between income groups, to which the foodservice industry has responded by more specialization. *Table 2* illus-

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Table 1

Restaurant Sales per Employee Fall Below Other Retailers

NATIONAL AVERAGES FOR EATING PLACES WITH PAYROLL, 1982

	Sales per establishment	Sales per employee	Payroll per employee	Employees per establishment
Restaurants	$383,680	$20,523	$5,646	19
Fast food	326,262	22,156	5,083	15
Contract feeding	605,384	24,484	7,226	25
Total, all retail businesses	—	71,817	—	11

Source: U.S. Bureau of the Census, 1982 Census of Retail Trade

Table 2

[illegible]

PERCENTAGE OF HOUSEHOLDS AT DIFFERENT INCOME LEVELS
(Incomes are shown in constant 1983 dollars)

	Under $15,000	$15,000-25,000	$25,000-35,000	$35,000-50,000	$50,000 and over
1968	32.2	25.0	24.2	10.9	7.7
1983	35.9	22.8	17.0	14.0	10.3

Source: U.S. Bureau of Census, Series P-60, Consumer Income

trates this growing separation.

This table indicates that, taking inflation into account, the past 15 years have shown increases in the proportions of households at the low and high ends of the income spectrum, with a major decrease in the middle ranges. Some analysts have described this phenomenon as the "shrinking middle." Examination of other years shows that this pattern has been consistent since the late 1960s. Implications for the restaurant industry are many. Perhaps most significant is the importance of targeting your market, something that the detailed RGI tables that follow can help you do by showing you which markets have demonstrated a high tendency to patronize restaurants (RAI) and in which the potential demand for restaurants is not being met (RGI). Market segmentation is increasing in terms of income. Fewer restaurants will be able to appeal to "the average customer" because a number of different customers are emerging. The key will be finding and appealing to *your* average customer. Some will be more affluent, others facing harder economic conditions. All will be increasingly willing to dine out, but different groups will be making different demands on the restaurant industry. Some will stress price, others convenience, still others variety, quality or ambience. A single establishment will find it more and more difficult to be "all things to all people." Instead, the restaurant executive must decide how best to target that segment of the market that is most likely to result in profit.

The occupational portrait of the American consumer is undergoing change. Some of the crucial data for understanding this change are given in *Table 3.*

Table 3 shows the average household income for households in which the primary wage earner is in a specified occupation group. The income figures represent a mean, or arithmetic average, rather than a median, or midpoint, and so are somewhat higher than income figures used elsewhere in this article. In addition, income is shown for the entire household, and there may well be other earners in addition to the primary earner for whom occupation is shown. Even if we take these factors into account, however, we can see how the demands placed on restaurants by members of different occupation groups may vary. An establishment catering to the needs of executives is unlikely to be able to also serve the needs of a factory worker whose household income is about two-thirds of the executive's. Understanding the demographics of your market area, your customers, and your potential customers can help you find the appropriate niche for your restaurant.

If occupation is a key factor in the demographics of the restaurant market, what changes are taking place in the occupational make-up of American society? Only limited information is available to trace the trends here, due to changes in how jobs are classified, but that information is revealing. The changeover of the American economy from a manufacturing base to a service base, the rise of the yuppie, and the growth in trained business administrators have all received a great deal of publicity in the news media. Reality may not move as rapidly as perceptions, but there is some truth to these ideas. *Table 4* provides us with the statistics with which to measure how occupations are changing.

The time span in this table is not sufficient to track a longterm shift in occupation patterns, but it is long enough to show the beginnings of a trend. We see that over the past three years, the percentage of executives has shown a steady increase, while professionals and technicians have held steady. Clerical workers and operators and laborers are making up a slowly shrinking percentage of the work force. Referring back to *Table 3,* we notice that the jobs showing an increasing percentage are found toward the higher paying end of the spectrum, while those that are taking up a smaller share of the total occupational picture are not the lowest, but are toward the lower portion. They may well be another instance of the "shrinking middle" phenomenon which we saw illustrated in *Table 2.* If so, it reinforces the suggestion made in the discussion of *Table 2* that the trend in the foodservice industry will be toward greater specialization, more market segmentation, and strong competition among restaurants to find their place in an increasingly diverse consumer market.

The change in household composition that has been noted in the past few years continues in the most recent set of statistics. A long-range picture of how households—the basic consumer unit in our society—have changed is available by matching 1970 data with information for 1984. We find that in 1970, eight of 10 households were family households, seven of 10 were married-couple families, and four of 10 households

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were made up of a married couple with children. By 1984, only seven of 10 households in the United States were family households, under six of 10 were married-couple households, and fewer than three of 10 were married couples with children. Women living alone or with children only had jumped from 15 percent to nearly 22 percent; married couples with three or more children in the home had dropped from 15 percent to six percent. By 1984, nearly one of every four households consisted of an individual living alone.

Traditional modes of living in households are being replaced by a greater variety of options. Because households constitute basic consumer units, the foodservice industry itself must respond to this great variety in living situations. Families dining out will become less common as families themselves become less common. Working parents will look to the foodservice industry for increased convenience and value. Persons living alone will utilize restaurants as places to take, meet and entertain friends. As in the other trends we've sketched in this article, this change in society will lead to greater segmentation of the restaurant market. More variety in menu selections, prices, and types of service, and other aspects of the restaurant experience will increasingly be expected of the foodservice industry.

Definitions

Population:

Updated from the 1980 U.S. Census of Population and Housing, it is an estimate of the number of people living in an area at the end of the year. It includes people living in colleges and hospitals, and armed forces permanently assigned to the area, but excludes tourists and transients. Large changes in group-quarters populations are not projected in these forecasts.

Demographic statistics have been estimated employing a population component procedure. That is, independent county estimates of births, mortality, and migration are generated. These population components are aggregated and either added or subtracted from the appropriate benchmark.

Fertility rates, for example, have been projected at their current rate of change. We assume that the pattern of births will continue its slow but steady rate. Similarly, we have assumed that no major medical advancement will be found over the next few years and that the mortality rates that are in effect today will continue unmodified.

Percent of U.S. Pop.:

A market's share of the total U.S. population.

Household:

A household consists of all the people occupying a single housing unit under 1980 census rules—such as a house, an apartment, a group of rooms, or a single room. The members of a household need not be related, and a single person living alone in a housing unit is also counted as a household.

All persons who are not members of households are regarded as living in group quarters: institutions, college dormitories, military barracks, etc. Caution: Although a county's population total will include all the people in the area, the household total will not do so because it excludes those living in group quarters.

Average Household Size:

Total population divided by the number of households. Depending upon whether it is above or below the U.S. average, it is used as a rough indicator of the rela-

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Table 3

Blue Collar Falls Below White Collar Incomes

AVERAGE (MEAN) INCOME OF HOUSEHOLDS BY OCCUPATION OF HOUSEHOLDER, 1983

Occupation group	Average income of household	1983 Index	Percent of householders with that occupation
Executive	$42,356	141	13.7
Professional	39,590	132	13.4
Technicians	32,380	108	3.1
Sales	32,982	110	11.1
Clerical	25,041	84	10.2
Service	18,681	62	10.3
Farming	19,009	63	1.8
Precision production	28,631	96	16.9
Operators & laborers	23,991	80	17.2
TOTAL Average	29,946	100	100.0

Source: U.S. Bureau of the Census, Series P-60, Consumer Income tive importance of family-type units or single-person units in a local area.

However, the figure can be artificially high in those relatively few counties where there is a disproportionate share of college, military, or other types of institutional population. The people living in such group quarters are part of the population total, but their dwellings are not part of the household total.

Eating and Drinking Places:

Includes establishments selling prepared foods and drinks for consumption on or near the premises or for take-out, as well as lunch counters and refreshment stands selling prepared foods and drinks for immediate food contractors, as well as leased eating and/or drinking concessions in theaters, hotels, amusement parks, etc. Restaurants and lunch counters operated by department stores are classified in the General Merchandise Group; those operated by hotels are classified in the Hotels Group.

Eating Places:

Includes retail sales and units of restaurants and lunch rooms, social caterers, cafeterias, fast food sales, contract feeding, and ice cream and frozen custard stands. Excludes drinking place sales and units.

Restaurants:

Establishments engaged in serving prepared food and beverages selected by the patron from a full menu. Waiter or waitress service is provided and the establishment has seating facilities for at least 15 patrons. These establishments often serve alcoholic beverages. Establishments in which sales of alcoholic beverages for consumption on the premises exceed receipts from sales of prepared foods and nonalcoholic beverages are classified as "Drinking places."

Fast Food:

Establishments primarily selling limited lines of refreshments and prepared food items. Included in this group are establishments which prepare refreshment items such as pizza, barbecued chicken, and hamburgers for consumption either on or near the premises or for "take-home" consumption.

Market Share:

Represents the percent of eating places from fast food units or from restaurants. It is indicative of customer preference for these types of establishments in that area.

Restaurant Activity Index (RAI):

The percent of U.S. eating place sales divided by the percent of U.S. food store sales, expressed as an index. An index greater than 100 indicates a more than average propensity to eat out rather than at home.

Restaurant Growth Index (RGI):

The RGI is designed to show the relationship between restaurant supply and demand in each market as an index. When supply equals demand, the index is 100. When demand exceeds supply, and the potential for growth is present, the index will exceed 100. The amount by which the RGI exceeds 100 represents the proportion of growth potential that is present—an index of 120 means that the market's demand could support 20 percent growth. When the market is saturated, and supply exceeds demand, the index will drop below 100.

Demand is measured by six factors:

Market's share of U.S. employed persons.

Market's share of U.S. working women.

Market's share of U.S. households with effective buying income of $25,000 or more.

Market's share of U.S. eating place sales.

Market's share of U.S. hotel and motel receipts.

Market's share of U.S. population age 14 & under; 25 to 44.

These factors are given equal weight and added together to create the demand portion of the equation (i.e., A + B + C + D + E + F divided by 6).

Table 4

[illegible]

PERCENTAGE OF EMPLOYED WORKERS BY JOB CATEGORY

	1982	1983	1984	1985
Executive	10.7	10.9	11.0	11.4
Professional	12.8	13.1	13.1	13.0
Technician	3.0	3.0	3.0	3.0
Sales	11.2	11.6	11.9	11.7
Clerical	16.7	16.4	16.0	16.1
Service	13.6	13.6	13.5	13.5
Farming	3.4	3.5	3.2	3.3
Precision production	12.0	12.0	12.3	12.4
Operators & laborers	16.7	15.8	15.9	15.6

Source: U.S. Bureau of Labor Statistics, Employment and Earnings

Footnote to sales figures

Adjustment of Eating place sales figures to be comparable to Current Retail Trade Reports.

After adjustments for differences in what Current Retail Trade includes in Eating places and which are not included in Eating places, the 1984 figure of $104,418,000,000 rises to $116,876,000,000. (This is the data used by Market Statistics in Malcolm Knapp's RGI Metro Area and ADI reports beginning on page 200.)

The components of adjustment are:

1-Merchandise line—Knapp includes only sales of food (meals and snacks) and alcoholic beverages. Adjusting for total sales adds $1,354,000,000.

2-Non-payroll establishments—Knapp includes only establishments with payrolls. Adjusting for no-payroll establishments adds $2,284,000,000.

3-Contract feeders—Knapp does not include contract feeders in eating places; but shows sales in the segments they serve. Adjusting for the inclusion of contract feeders adds $8,820,000,000, a figure higher than the Census.

Adjustment of Drinking places sales figures to be comparable to current Retail Trade Reports.

1-Merchandise line—Knapp includes only sales of food (meals and snacks) and alcoholic beverages. Adjusting for total sales adds $688,000,000.

2-Nonpayroll establishments—Knapp includes only establishments with payrolls. Adjusting for non-payroll establishments adds $1,028,000,000.

The adjusted, comparable figure rises from Knapp's $8,248,000,000 to $9,964,000,000. Adjusted Eating and Drinking place sales figures go from $112,666,000,000 to $126,840,000,000.

Supply is measured by the percentage of U.S. total eating places located in the market.

The RGI is created by dividing demand by supply, and multiplying the result by 100, so that the final figure will be in index form.

Television Market:

The TV markets are the American Research Bureau's Areas of Dominant Influence (ADIs). ARB studies each county for its measurable viewing patterns. The hours of viewing accorded each TV station whose signal reached the county are totalled; then each station's percentage share of total viewing hours is calculated. The market of origin of the TV stations with the largest share of viewing hours becomes the ADI name for that market, and all counties whose largest viewing share is given to stations of that same market of origin are grouped within the ADI. (For its purposes, ARB splits certain counties, treating each portion as if it were a separate county.) Each county (or portion) is allocated exclusively to a single ADI; thus overlap is eliminated. All of the area of the United States is covered except for Hawaii and part of Alaska.

Metropolitan Statistical Areas (MSAs):

In the Restaurant Growth Index, metropolitan markets are identical with Federal government's definition of MSAs or PMSAs (Primary Metropolitan Statistical Area), except in New England, where NECMAs (New England County Metropolitan Areas) are used. These metropolitan markets are counties or groups of counties which meet certain criteria of metropolitan character.

The basic criteria for metropolitan areas are:

1. Each metropolitan statistical area must include a city which, with contiguous and densely settled territory, constitutes a Census Bureau defined urbanized area with at least 50,000 population.

2. If a metropolitan statistical area's largest city has less than 50,000 population, the area must have a total population of at least 100,000.

Thus, a city of 50,000 or an urbanized area surrounding a city with 50,000 and a population density of 1,000 per square mile becomes a basic test of the metropolitan character of an area. The county or counties in which the city or urbanized area is located, plus surrounding counties with heavy commuting between themselves and the core counties and population density sufficient to establish them as metropolitan, are designated as the metropolitan area.

Certain areas meet many tests of metropolitan character, but are located within larger, dominating metropolitan statistical areas of one million or more population. To preserve the identity of these areas within the large, "mega-metropolitan areas," the government devised a second level of metropolitan criteria. These criteria identify, within metropolitan areas of at least one million population, sub-areas that are called Primary Metropolitan Statistical Areas (PMSAs). A county or counties that express strong local opinion to be identified as a PMSA must have:

1. At least 100,000 population.

2. At least 60 percent of its population urban.

3. Less than 50 percent of its resident workers commuting to jobs outside the county.

The Restaurant Growth Index treats MSAs and PMSAs as equivalent areas, so that the most locally identifiable area that qualifies as metropolitan will be the one appearing in the statistical tables.

In New England, the offical MSA definitions are based on cities and towns rather than counties. Because the Restaurant Growth Index is developed from a county level data base, we use New England County Metropolitan Areas (NECMAs) in the six New England states. NECMAs are determined by using the MSA standards as described above.

Jeffrey Hall, formerly director of marketing of Market Statistics, is a consultant to Restaurant Business *Magazine. All data are copyrighted by* Restaurant Business and Sales & Marketing Management *Magazines and further reproduction without permission is prohibited.*

Metropolitan Statistical Areas

The following list shows the definitions of each metropolitan area as covered in the Restaurant Growth Index and defined by the Federal government.

Abilene, TX—Taylor
Akron, OH—Portage, Summit
Albany, GA—Dougherty, Lee
Albany-Schenectady-Troy, NY—Albany, Greene, Montgomery, Renselaer, Saratoga, Schenectady
Albuquerque, NM—Bernalillo
Alexandria, LA—Rapides
Allentown-Bethlehem, PA-NJ—Carbon, Pennsylvania; Lehigh, Pennsylvania; Northampton, Pennsylvania; Warren, New Jersey
Alton-Granite City, IL—Jersey, Madison
Altoona, PA—Blair
Amarillo, TX—Potter, Randall
Anaheim-Santa Ana, CA—Orange
Anchorage, AK—Anchorage Borough
Anderson, IN—Madison
Anderson, SC—Anderson
Ann Arbor, MI—Washtenaw
Anniston, AL—Calhoun
Appleton-Oshkosh-Neenah, WI Calumet, Outagamie, Winnebago
Asheville, NC—Buncombe
Athens, GA—Clarke, Jackson, Madison, Oconee
Atlanta, GA—Barrow, Butts, Cherokee, Clayton, Cobb, Coweta, DeKalb, Douglas, Fayette, Forsyth, Fulton, Gwinnett, Henry, Newton, Paulding, Rockdale, Spalding, Walton
Atlantic City, NJ—Atlantic, Cape May
Augusta, GA-SC—Columbia, McDuffie, GA; Richmond, GA; Aiken, SC
Aurora-Elgin, IL—Kane, Kendall
Austin, TX—Hays, Travis, Williamson
Bakersfield, CA—Kern
Baltimore, MD—Anne Arundel, Baltimore, Carroll, Harford, Howard, Queen Anne's, Baltimore
Bangor, ME—Penobscot
Baton Rouge, LA—Ascension, East Baton Rouge, Livingston, West Baton Rouge
Battle Creek, MI—Calhoun
Beaumont-Port Arthur, TX—Hardin, Jefferson, Orange
Beaver County, PA—Beaver
Bellingham, WA—Whatcom
Benton Harbor,MI—Berrien
Bergen-Passaic, NJ—Bergen, Passaic
Billings, MT—Yellowstone
Biloxi-Gulfport, MS—Hancock, Harrison
Binghamton, NY—Broome, Tioga
Birmingham, AL—Blount, Jefferson, St. Clair, Shelby, Walker
Bismarck, ND—Burleigh, Morton
Bloomington, IN—Monroe
Bloomington-Normal, IL—McLean
Boise City, ID—Ada
Boston-Lawrence-Salem-Lowell-Brockton, MA—Essex, Middlesex, Norfolk, Plymouth, Suffolk
Boulder-Longmont, CO—Boulder
Bradenton, FL—Manatee
Brazoria, TX—Brazoria
Bremerton, WA—Kitsap
Bridgeport-Stamford-Norwalk-Danbury, CT—Fairfield
Brownsville-Harlingen, TX—Cameron
Bryan-College Station, TX—Brazos
Buffalo, NY—Erie
Burlington, NC—Alamance
Burlington, VT—Chittenden, Grand Isle
Canton, OH—Carroll, Stark
Casper, WY—Natrona
Cedar Rapids, IA—Linn
Champaign-Urbana-Rantoul, IL—Champaign
Charleston, SC—Berkeley, Charleston, Dorchester
Charleston, WV—Kanawha, Putnam
Charlotte-Gastonia-Rock Hill, NC-SC—Cabarrus, Gaston, Kannapolis, Lincoln, Mecklenburg, Rowan, Union, all NC; York, SC
Charlottesville, VA—Albemarle, Fluvanna, Greene, Charlottesville
Chattanooga, TN-GA—Hamilton, TN; Marion, TN; Sequatchie, TN; Catoosa, GA; Dade, GA; Walker, GA
Cheyenne, WY—Laramie
Chicago, IL—Cook, DuPage, McHenry
Chico, CA—Butte
Cincinnati, OH-KY-IN—Clermont, OH; Hamilton, OH; Warren, OH; Boone, KY; Campbell, KY; Kenton, KY; Dearborn, IN
Clarksville-Hopkinsville, TN-KY—Montgomery, TN; Christian, KY
Cleveland, OH—Cuyahoga, Geauga, Lake, Medina
Colorado Springs, CO—El Paso
Columbia, MO—Boone
Columbia, SC—Lexington, Richland
Columbus, GA-AL—Chattahoochee, GA; Muscogee, GA; Russell, AL
Columbus, OH—Delaware, Fairfield, Franklin, Licking, Madison, Pickaway, Union
Corpus Christi, TX—Nueces, San Patricio
Cumberland, MD-WV—Allegany, MD; Mineral, WV
Dallas, TX—Collin, Dallas, Denton, Ellis, Kaufman, Rockwall
Danville, VA—Pittsylvania, Danville
Davenport-Rock Island-Moline, IA-IL—Scott, IA; Henry, IL; Rock Island, IL
Dayton-Springfield, OH—Clark, Greene, Miami, Montgomery
Daytona Beach, FL—Volusia
Decatur, IL—Macon
Denver, CO—Adams, Arapahoe, Denver, Douglas, Jefferson
Des Moines, IA—Dallas, Polk, Warren
Detroit, MI—Lapeer, Livingston, Macomb, Monroe, Oakland, St. Clair, Wayne
Dothan, AL—Dale, Houston
Dubuque, IA—Dubuque
Duluth, MN-WI—St. Louis, MN; Douglas, WI
East St. Louis-Belleville, IL—Clinton, St. Clair
Eau Claire, WI—Chippewa, Eau Claire
El Paso, TX—El Paso
Elkhart-Goshen, IN—Elkhart
Elmira, NY—Chemung
Enid, OK—Garfield
Erie, PA—Erie
Eugene-Springfield, OR—Lane
Evansville, IN-KY—Posey, IN; Vanderburgh, IN; Warrick, IN; Henderson, KY
Fargo-Moorehead, ND-MN—Cass, ND; Clay, MN
Fayetteville, NC—Cumberland
Fayetteville-Springdale, AR—Washington
Flint, MI—Genesee
Florence, AL—Colbert, Lauderdale
Florence, SC—Florence
Fort Collins-Loveland, CO—Larimer
Fort Lauderdale-Hollywood-Pompano Beach, FL—Broward
Fort Myers, FL—Cape Coral, Lee
Fort Pierce, FL—Martin, St. Lucie
Fort Smith, AR-OK—Crawford, Sebastian, AR; Sequoyah, OK
Fort Walton Beach, FL—Okaloosa
Fort Wayne, IN—Allen, De Kalb, Whitley
Fort Worth-Arlington, TX—Johnson, Parker, Tarrant
Fresno, CA—Fresno
Gadsden, AL—Etowah
Gainesville, FL—Alachua, Bradford
Galveston-Texas City, TX—Galveston
Gary-Hammond, IN—Lake, Porter
Glens Falls, NY—Warren, Washington
Grand Forks, ND—Grand Forks
Grand Rapids, MI—Kent, Ottawa

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MSAs *continued from page 200*

Great Falls, MT—Cascade
Greeley, CO—Weld
Green Bay, WI—Brown
Greensboro-Winston-Salem-High Point, NC—Davidson, Davie, Forsyth, Guilford, Randolph, Stokes, Yadkin
Greenville-Spartanburg, SC—Greenville, Pickens, Spartanburg
Hagerstown, MD—Washington
Hamilton-Middletown, OH—Butler
Harrisburg-Lebanon-Carlisle, PA—Cumberland, Dauphin, Lebanon, Perry
Hartford-New Britain-Middletown-Bristol, CT—Hartford, Middlesex, Tolland
Hickory, NC—Alexander, Burke, Catawba
Honolulu, HI—Honolulu
Houma-Thibodaux, LA—Lafourche, Terrebonne
Houston, TX—Fort Bend, Harris, Liberty, Montgomery, Waller
Huntington-Ashland, WV-KY-OH—Cabell, WV; Wayne, WV; Boyd, KY; Carter, KY; Greenup, KY; Lawrence, OH
Huntsville, AL—Madison
Indianapolis, IN—Boone, Hamilton, Hancock, Hendricks, Johnson, Marion, Morgan, Shelby
Iowa City, IA—Johnson
Jackson, MI—Jackson
Jackson, MS—Hinds, Madison, Rankin
Jackson, TN—Madison
Jacksonville, FL—Clay, Duval, Nassau, St. Johns
Jacksonville, NC—Onslow
Janesville-Beloit, WI—Rock
Jersey City, NJ—Hudson
Johnson City-Kingsport-Bristol, TN-VA—Carter, TN; Hawkins, TN; Sullivan, TN; Unicoi, TN; Washington, TN; Scott, VA; Washington, VA; Bristol, VA
Johnstown, PA—Cambria, Somerset
Joliet, IL—Grundy, Will
Joplin, MO—Jasper, Newton
Kalamazoo, MI—Kalamazoo
Kankakee, IL—Kankakee
Kansas City, MO-KS (recombined)—Cass, Clay, Jackson, Lafayette, Platte, Ray, all MO; Johnson, Leavenworth, Miami, Wyandotte, all KS.
Kenosha, WI—Kenosha
Killeen-Temple, TX—Bell, Coryell
Knoxville, TN—Anderson, Blount, Grainger, Jefferson, Knox, Sevier, Union
Kokomo, IN—Howard, Tipton
La Crosse, WI—La Crosse
Lafayette, LA—Lafayette, St. Martin
Lafayette-West Lafayette, IN—Tippecanoe
Lake Charles, LA—Calcasieu
Lake County, IL—Lake
Lakeland-Winter Haven, FL—Polk
Lancaster, PA—Lancaster
Lansing-East Lansing, MI—Clinton, Eaton, Ingham
Laredo, TX—Webb
Las Cruces, NM—Dona Ana
Las Vegas, NV—Clark
Lawrence, KS—Douglas
Lawton, OK—Comanche
Lewiston-Auburn, ME—Androscoggin
Lexington-Fayette, KY—Bourbon, Clark, Fayette, Jessamine, Scott, Woodford
Lima, OH—Allen, Auglaize
Lincoln, NE—Lancaster
Little Rock-North Little Rock, AR—Faulkner, Lonoke, Pulaski, Saline
Longview-Marshall, TX—Gregg, Harrison
Lorain-Elyria, OH—Lorain
Los Angeles-Long Beach, CA—Los Angeles
Louisville, KY-IN—Bullitt, KY; Jefferson, KY; Oldham, KY; Shelby, KY; Clark, IN; Floyd, IN; Harrison, IN
Lubbock, TX—Lubbock
Lynchburg, VA—Amherst, Campbell, Lynchburg
Macon-Warner Robins, GA—Bibb, Houston, Jones, Peach
Madison, WI—Dane
Manchester, NH—Hillsborough
Mansfield, OH—Richland
McAllen-Endinburg-Mission, TX—Hidalgo
Medford, OR—Jackson
Melbourne-Titusville-Palm Bay, FL—Brevard
Memphis, TN-AR-MS—Shelby, TN; Tipton, TN; Crittenden, AR; De Soto, MS
Miami-Hialeah, FL—Dade
Middlesex-Somerset-Hunterdon, NJ—Hunterdon, Middlesex, Somerset
Midland, TX—Midland
Milwaukee, WI—Milwaukee, Ozaukee, Washington, Waukesha
Minneapolis-St. Paul, MN-WI—Anoka, MN; Carver, MN; Chisago, MN; Dakota, MN; Hennepin, MN; Isanti, MN; Ramsey, MN; Scott, MN; Washington, MN; Wright, MN; St. Croix, WI
Mobile, AL—Baldwin, Mobile
Modesto, CA—Stanislaus
Monmouth-Ocean, NJ—Monmouth, Ocean
Monroe, LA—Ouachita
Montgomery, AL—Autauga, Elmore, Montgomery
Muncie, IN—Delaware
Muskegon, MI—Muskegon
Naples, FL—Collier
Nashville, TN—Cheatham, Davidson, Dickson, Robertson, Rutherford, Sumner, Williamson, Wilson
Nassau-Suffolk, NY—Nassau, Suffolk
New Bedford-Fall River-Attleboro, MA—Bristol
New Haven-Waterbury-Meriden, CT—New Haven
New London-Norwich, CT—New London
New Orleans, LA—Jefferson, Orleans, St. Bernard, St. Charles, St. John the Baptist, St. Tammany
New York, NY—Bronx, Kings, New York, Putnam, Queens, Richmond, Rockland, Westchester
Newark, NJ—Essex, Morris, Sussex, Union
Niagara Falls, NY—Niagara
Norfolk-Virginia Beach-Newport News, VA—Gloucester, James City, York, Chesapeake, Hampton, Newport News, Norfolk, Poquoson, Portsmouth, Suffolk, Virginia Beach, Williamsburg
Oakland, CA—Alameda, Contra Costa
Ocala, FL—Marion
Odessa, TX—Ector
Oklahoma City, OK—Canadian, Cleveland, Logan, McClain, Oklahoma, Pottawatomie
Olympia, WA—Thurston
Omaha, NE-IA—Douglas, NE; Sarpy, NE; Washington, NE; Pottawattamie, IA
Orange County, NY—Orange
Orlando, FL—Orange, Osceola, Seminole
Owensboro, KY—Daviess
Oxnard-Ventura, CA—Ventura
Panama City, FL—Bay
Parkersburg-Marietta, WV-OH—Wood, WV; Washington, OH
Pascagoula, MS—Jackson
Pensacola, FL—Escambia, Santa Rosa
Peoria, IL—Peoria, Tazewell, Woodford
Philadelphia, PA-NJ—Bucks, PA; Chester, PA; Delaware, PA; Montgomery, PA; Philadelphia, PA; Burlington, NJ; Camden, NJ; Gloucester, NJ
Phoenix, AZ—Maricopa
Pine Bluff, AR—Jefferson
Pittsburgh, PA—Allegheny, Fayette, Washington, Westmoreland
Pittsfield, MA—Berkshire
Portland, ME—Cumberland
Portland, OR—Clackamas, Multnomah, Washington, Yamhill
Portsmouth-Dover-Rochester, NH—Rockingham, Strafford
Poughkeepsie, NY—Dutchess
Providence-Pawtucket-Woonsocket, RI—Bristol, Kent, Providence, Washington
Provo-Orem, UT—Utah
Pueblo, CO—Pueblo
Racine, WI—Racine
Raleigh-Durham, NC—Durham, Franklin, Orange, Wake
Rapid City, SD—Pennington
Reading, PA—Berks
Redding, CA—Shasta
Reno, NV—Washoe
Richland-Kennewick-Pasco, WA—Benton, Franklin
Richmond-Petersburg, VA—Charles City, Chesterfield, Dinwiddie, Goochland, Hanover, Henrico, New Kent, Pawhatan, Prince George, Colonial Heights, Hopewell, Petersburg, Richmond
Riverside-San Bernardino, CA—Riverside, San Bernardino
Roanoke, VA—Botetourt, Roanoke County, Roanoke City, Salem
Rochester, MN—Olmstead
Rochester, NY—Livingston, Monroe, Ontario, Orleans, Wayne
Rockford, IL—Boone, Winnebago
Sacramento, CA—El Dorado, Placer, Sacramento, Yolc, Roseville City
Saginaw-Bay City-Midland, MI—Bay, Midland, Saginaw
Santa Fe, NM—Los Alamos, Santa Fe
St. Cloud, MN—Benton, Sherburne, Stearns
St. Joseph, MO—Buchanan
St. Louis, MO-IL—Franklin, MO; Jefferson, MO; St. Charles, MO; St. Louis County, MO; St. Louis City, MO; Monroe, IL
Salem, OR—Marion, Polk
Salinas-Seaside-Monterey, CA—Monterey
Salt Lake City-Ogden, UT—Davis, Salt Lake, Weber
San Angelo, TX—Tom Green
San Antonio, TX—Bexar, Comal, Guadalupe
San Diego, CA—San Diego
San Francisco, CA—Marin, San Francisco, San Mateo
San Jose, CA—Santa Clara
Santa Barbara-Santa Maria-Lompoc, CA—Santa Barbara
Santa Cruz, CA—Santa Cruz
Santa Rosa-Petaluma, CA—Sonoma
Sarasota, FL—Sarasota
Savannah, GA—Chatham, Effingham
Scranton-Wilkes-Barre, PA—Columbia, Lackawanna, Luzerne, Monroe, Wyoming

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MSAs *continued from page 202*

Seattle, WA—King, Snohomish
Sharon, PA—Mercer
Sheboygan, WI—Sheboygan
Sherman-Denison, TX—Grayson
Shreveport, LA—Bossier, Caddo
Sioux City, IA-NE—Woodbury, IA, Dakota, NE
Sioux Falls, SD—Minnehaha
South Bend-Mishawaka, IN—St. Joseph
Spokane, WA—Spokane
Springfield, IL—Menard, Sangamon
Springfield, MA—Hampden, Hampshire
Springfield, MO—Christian, Greene
State College, PA—Centre
Steubenville-Weirton, OH-WV—Jefferson, OH; Brooke, WV; Hancock, WV
Stockton, CA—San Joaquin
Syracuse, NY—Madison, Onondaga, Oswego
Tacoma, WA—Pierce
Tallahassee, FL—Gadsden, Leon
Tampa-St. Petersburg-Clearwater, FL—Hernando, Hillsborough, Pasco, Pinellas
Terre Haute, IN—Clay, Vigo
Texarkana, TX-Texarkana, AR—Bowie, TX; Miller, AR
Toledo, OH—Fulton, Lucas, Wood
Topeka, KS—Shawnee
Trenton, NJ—Mercer
Tucson, AZ—Pima
Tulsa, OK—Creek, Osage, Rogers, Tulsa, Wagoner
Tuscaloosa, AL—Tuscaloosa
Tyler, TX—Smith
Utica-Rome, NY—Herkimer, Oneida
Vallejo-Fairfield-Napa, CA—Napa, Solano
Vancouver, WA—Clark
Victoria, TX—Victoria
Vineland-Millville-Bridgeton, NJ—Cumberland
Visalia-Tulare-Porterville, CA—Tulare
Waco, TX—McLennan
Washington, DC-MD-VA—District of Columbia; Calvert, MD; Charles, MD; Frederick, MD; Montogomery, MD; Prince George's, MD; Arlington, VA; Fairfax, VA; Loudon, VA; Prince William, VA; Stafford, VA; Alexandria, VA; Fairfax, VA; Falls Church, VA; Manassas, VA; Manassas Park, VA
Waterloo-Cedar Falls, IA—Black Hawk, Bremer
Wausau, WI—Marathon
West Palm Beach-Boca Raton-Delray Beach, FL—Palm Beach
Wheeling, WV-OH—Marshall, WV; Ohio, WV; Belmont, OH
Wichita, KS—Butler, Sedgwick
Wichita Falls, TX—Wichita
Williamsport, PA—Lycoming
Wilmington, DE-MD-NJ—New Castle, DE; Cecil, MD; Salem, NJ
Wilmington, NC—New Hanover
Worcester, MA—Worcester
Yakima, MA—Yakima
York, PA—Adams, York
Youngstown-Warren, OH—Mahoning, Trumbull
Yuba City, CA—Sutter, Yuba

For information circle number 187

RGI Regional Summary

REGION State	12/31/84			1984								
	Population (Thous.)	% Of U.S.	Average Household Size	Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Eating Place Units	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
Connecticut	3,152.8	1.3231	2.76	1,897,863	1,755,540	3,663	556,466	32	970,986	55	104	91
Maine	1,165.8	0.4893	2.76	541,444	524,964	1,292	196,991	38	289,408	55	84	84
Massachusetts	5,807.9	2.4375	2.71	4,357,076	4,040,754	6,469	1,145,454	28	2,339,910	58	131	104
New Hampshire	982.4	0.4123	2.75	567,323	554,208	1,185	167,719	30	337,626	61	88	93
Rhode Island	963.0	0.4041	2.77	521,174	474,704	1,130	151,864	32	275,951	58	108	81
Vermont	533.4	0.2239	2.74	294,612	272,002	702	77,164	28	166,520	61	91	89
NEW ENGLAND	**12,605.3**	**5.2902**	**2.74**	**8,179,492**	**7,622,172**	**14,441**	**2,295,658**	**30**	**4,380,401**	**57**	**113**	**96**
New Jersey	7,545.8	3.1669	2.77	3,921,565	3,394,956	6,833	1,069,006	31	1,841,823	54	85	120
New York	17,915.5	7.5188	2.71	9,299,985	8,575,725	18,445	2,438,762	28	4,763,939	56	104	99
Pennsylvania	11,965.4	5.0217	2.69	5,327,320	4,752,922	10,965	1,771,460	37	2,356,607	50	87	98
MIDDLE ATLANTIC	**37,426.7**	**15.7074**	**2.71**	**18,548,870**	**16,723,603**	**36,243**	**5,279,228**	**32**	**8,962,369**	**54**	**95**	**103**
Illinois	11,552.9	4.8485	2.74	5,384,840	4,925,911	11,705	1,980,077	40	2,458,294	50	107	97
Indiana	5,556.9	2.3322	2.80	2,695,034	2,496,440	5,749	1,201,723	48	1,041,912	42	98	89
Michigan	9,180.2	3.8528	2.79	4,131,936	3,738,400	8,593	1,492,228	40	1,880,814	50	98	96
Ohio	10,813.8	4.5384	2.71	5,083,628	4,656,794	10,944	2,064,706	44	2,150,581	46	93	90
Wisconsin	4,788.3	2.0096	2.71	2,293,836	1,915,015	5,290	669,834	35	1,123,326	59	96	84
EAST NORTH CENTRAL	**41,892.1**	**17.5815**	**2.75**	**19,589,274**	**17,732,560**	**42,281**	**7,408,568**	**42**	**8,654,927**	**49**	**99**	**92**
Iowa	2,941.3	1.2344	2.63	1,169,263	1,021,029	3,430	451,831	44	480,047	47	72	73
Kansas	2,448.0	1.0274	2.66	1,030,601	982,629	2,897	502,633	51	394,403	40	83	78
Minnesota	4,183.6	1.7557	2.73	2,032,469	1,818,819	4,206	620,602	34	1,053,308	58	90	101
Missouri	5,046.6	2.1180	2.74	2,389,506	2,250,102	5,254	1,034,073	46	956,094	42	87	92
Nebraska	1,619.4	0.6797	2.66	727,182	627,109	1,875	266,558	43	316,856	51	90	79
North Dakota	692.4	0.2905	2.85	297,050	245,420	716	98,613	40	133,163	54	91	89
South Dakota	713.7	0.2995	2.73	290,898	247,314	825	85,996	35	145,691	59	83	76
WEST NORTH CENTRAL	**17,645.0**	**7.4052**	**2.70**	**7,936,969**	**7,192,422**	**19,203**	**3,060,306**	**43**	**3,479,562**	**48**	**85**	**87**
Delaware	615.0	0.2582	2.82	316,427	294,281	630	129,662	44	143,294	49	94	97
District of Columbia	618.1	0.2594	2.47	653,950	611,035	907	160,488	26	309,881	51	277	175
Florida	11,166.0	4.6861	2.54	6,667,155	6,257,805	11,270	2,304,856	37	3,302,276	53	108	112
Georgia	5,889.6	2.4718	2.85	2,758,998	2,632,448	5,384	1,373,925	52	967,137	37	102	109
Maryland	4,381.6	1.8389	2.80	2,409,392	2,214,267	3,938	931,807	42	974,174	44	98	110
North Carolina	6,215.9	2.6088	2.77	2,683,168	2,618,415	5,868	1,410,869	54	962,472	37	88	97
South Carolina	3,353.4	1.4074	2.86	1,343,043	1,301,125	2,924	665,933	51	476,479	37	88	109
Virginia	5,692.4	2.3890	2.87	2,516,820	2,472,867	5,414	1,120,206	45	1,056,762	43	93	110
West Virginia	1,972.5	0.8278	2.72	601,483	572,038	1,551	331,592	58	194,530	34	65	95
SOUTH ATLANTIC	**39,904.5**	**16.7474**	**2.73**	**19,950,436**	**18,974,281**	**37,886**	**8,429,338**	**44**	**8,387,005**	**44**	**99**	**109**
Alabama	4,042.4	1.6965	2.76	1,217,643	1,173,536	2,962	678,982	58	368,805	31	68	102
Kentucky	3,769.7	1.5821	2.82	1,419,549	1,350,460	3,136	771,749	57	468,383	35	78	100
Mississippi	2,627.2	1.1026	2.92	704,789	681,460	1,895	377,630	55	227,961	33	59	102
Tennessee	4,759.9	1.9977	2.75	1,988,449	1,929,011	4,373	941,486	49	796,374	41	82	101
EAST SOUTH CENTRAL	**15,199.2**	**6.3789**	**2.80**	**5,330,430**	**5,134,467**	**12,366**	**2,769,847**	**54**	**1,861,523**	**36**	**74**	**101**
Arkansas	2,377.8	0.9979	2.77	837,321	817,123	2,200	474,829	58	264,577	32	88	83
Louisiana	4,500.7	1.8888	2.87	2,357,954	2,197,481	3,679	955,466	43	808,835	37	100	116
Oklahoma	3,348.6	1.4054	2.67	1,866,818	1,810,499	3,736	902,476	50	668,285	37	108	82
Texas	16,167.6	6.7853	2.86	9,613,868	8,935,932	16,242	3,976,082	44	3,696,774	41	107	100
WEST SOUTH CENTRAL	**26,394.7**	**11.0774**	**2.83**	**14,675,961**	**13,761,035**	**25,857**	**6,308,853**	**46**	**5,438,471**	**40**	**105**	**98**
Arizona	3,106.3	1.3037	2.66	1,631,452	1,499,397	3,167	562,876	38	780,684	52	89	101
Colorado	3,224.7	1.3534	2.60	2,125,754	1,964,967	3,881	643,156	33	1,102,063	56	106	97
Idaho	1,017.1	0.4269	2.92	389,493	350,248	1,106	140,433	40	187,742	54	73	78
Montana	827.6	0.3473	2.63	446,646	346,791	1,128	125,983	36	204,259	59	80	75
Nevada	920.4	0.3862	2.49	642,469	565,940	999	202,759	36	296,730	52	93	530
New Mexico	1,451.1	0.6090	2.82	706,848	653,022	1,614	286,713	44	303,027	46	88	85
Utah	1,680.5	0.7052	3.22	555,876	535,361	1,453	245,544	46	254,090	47	74	101
Wyoming	515.6	0.2164	2.75	326,171	272,934	636	110,460	40	141,166	52	86	119
MOUNTAIN	**12,743.3**	**5.3481**	**2.73**	**6,824,709**	**6,188,660**	**13,984**	**2,317,924**	**37**	**3,269,761**	**53**	**90**	**125**
Alaska	523.7	0.2198	2.93	527,690	437,245	477	137,566	31	194,631	45	125	145
California	25,806.6	10.8306	2.72	17,093,279	16,073,826	29,280	5,864,669	36	8,915,633	55	119	96
Hawaii	1,053.9	0.4423	3.21	1,110,858	1,039,529	1,396	356,707	34	580,956	56	198	175
Oregon	2,693.3	1.1303	2.63	1,539,235	1,404,637	3,427	532,453	38	763,702	54	117	78
Washington	4,386.4	1.8409	2.59	2,727,810	2,495,259	4,850	861,450	35	1,420,061	57	111	90
PACIFIC	**34,463.9**	**14.4639**	**2.71**	**22,998,872**	**21,450,496**	**39,430**	**7,752,845**	**36**	**11,874,983**	**55**	**120**	**97**
United States Total	**238,274.7**	**100.0000**	**2.74**	**124,035,013**	**114,779,696**	**241,691**	**45,622,567**	**40**	**56,309,002**	**49**	**100**	**100**

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Sales by Metropolitan Area

This section of the Restaurant Growth Index provides sales, unit counts, market share, RAI and RGI indexes for 316 Metropolitan Statistical Areas (MSAs) as defined by the U.S. Office of Federal Statistical Policy and Standards.

	12/31/84			1984								
					Eating Place		Fast Food		Restaurant			
STATE Metro Name	Population (Thous.)	% Of U.S.	Average Household Size	Eating & Drinking Place Sales ($000)	Sales ($000)	Units	Sales ($000)	Market Share (%)	Sales ($000)	Market Share (%)	RAI	RGI
ALABAMA												
Anniston	124.9	0.0524	2.88	31,992	31,285	82	18,255	58	9,554	31	76	107
Birmingham	915.7	0.3842	2.67	315,186	303,382	714	165,014	54	98,261	32	73	105
Dothan	126.1	0.0529	2.78	49,357	48,087	113	30,736	64	13,824	29	81	91
Florence	139.6	0.0586	2.68	43,853	42,173	115	24,611	58	12,878	31	79	88
Gadsden	104.8	0.0440	2.68	33,367	32,584	97	19,013	58	9,949	31	67	74
Huntsville	208.0	0.0873	2.71	98,870	93,952	178	52,332	56	32,815	35	103	131
Mobile	468.8	0.1967	2.80	184,440	172,933	384	92,850	54	57,303	33	70	103
Montgomery	291.4	0.1224	2.80	103,398	99,620	224	58,130	58	30,419	31	82	116
Tuscaloosa	143.2	0.0601	2.78	52,801	49,494	112	28,881	58	15,115	31	68	98
Non-Metro Portion of State	1,471.6	0.6176	2.80	293,452	289,306	913	182,904	63	85,415	30	52	97
State Total	**4,042.4**	**1.6965**	**2.76**	**1,217,643**	**1,173,536**	**2,962**	**678,982**	**58**	**368,805**	**31**	**68**	**102**
ALASKA												
Anchorage	229.8	0.0964	2.74	304,357	268,467	243	89,305	33	112,484	42	176	143
Non-Metro Portion of State	293.9	0.1234	3.10	223,333	168,778	234	4[illegible],261	29	82,147	49	86	147
State Total	**523.7**	**0.2198**	**2.93**	**527,690**	**437,245**	**477**	**137,[illegible]66**	**31**	**194,631**	**45**	**125**	**145**
ARIZONA												
Phoenix	1,736.0	0.7285	2.59	1,019,053	946,317	1,737	341,660	36	496,761	52	93	113
Tucson	602.1	0.2527	2.55	307,852	279,347	638	114,821	41	135,006	48	95	90
Non-Metro Portion of State	768.2	0.3225	2.93	304,547	273,733	792	106,395	39	148,917	54	71	86
State Total	**3,106.3**	**1.3037**	**2.66**	**1,631,452**	**1,499,397**	**3,167**	**562,876**	**38**	**780,684**	**52**	**89**	**101**
ARKANSAS												
Fayetteville - Springdale	106.0	0.0445	2.72	54,528	52,871	130	30,463	58	17,788	34	113	73
Fort Smith	175.5	0.0737	2.74	76,882	75,819	191	43,334	57	25,650	34	120	77
Little Rock - North Little Rock	501.5	0.2103	2.78	246,337	240,988	486	128,850	53	85,426	35	108	104
Pine Bluff	90.2	0.0378	2.96	28,381	27,461	81	15,824	58	9,239	34	69	83
Texarkana	119.5	0.0502	2.76	59,686	57,824	121	28,139	49	22,380	39	96	82
Non-Metro Portion of State	1,452.1	0.6096	2.76	399,922	390,527	1,267	238,953	61	118,313	30	74	76
State Total	**2,377.8**	**0.9979**	**2.77**	**837,321**	**817,123**	**2,200**	**474,829**	**58**	**264,577**	**32**	**88**	**83**
CALIFORNIA												
Anaheim - Santa Ana	2,103.6	0.8828	2.81	1,736,544	1,665,364	2,566	601,177	36	949,783	57	144	100
Bakersfield	460.5	0.1932	2.84	259,163	244,599	502	107,135	44	122,854	50	99	86
Chico	163.6	0.0687	2.50	82,287	74,679	187	27,447	37	41,265	55	77	63
Fresno	569.9	0.2392	2.83	251,466	232,953	613	107,310	46	116,082	50	89	77
Los Angeles - Long Beach	7,908.9	3.3192	2.74	5,299,974	5,014,814	8,350	1,742,226	35	2,789,279	56	122	106
Modesto	299.8	0.1258	2.80	138,726	131,680	295	65,621	50	58,351	44	82	82
Oakland	1,875.8	0.7873	2.58	1,131,078	1,054,156	2,027	419,512	40	559,181	53	105	92
Oxnard - Ventura	596.9	0.2505	3.00	265,414	253,395	531	93,901	37	146,678	58	88	96
Redding	134.6	0.0564	2.63	58,929	54,051	176	19,866	37	29,867	55	72	64

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RGI Metro Report

	12/31/84			1984								
STATE Metro Name	Population (Thous.)	% Of U.S.	Average House-hold Size	Eating & Drinking Place Sales ($000)	Eating Place		Fast Food		Restaurant		RAI	RGI
					Sales ($000)	Units	Sales ($000)	Market Share (%)	Sales ($000)	Market Share (%)		
CALIFORNIA *continued*												
Riverside - San Bernardino	1,825.4	0.7660	2.80	959,137	912,130	1,758	416,109	46	455,986	50	100	89
Sacramento	1,242.4	0.5215	2.56	782,932	730,039	1,531	313,211	43	371,411	51	111	83
Salinas - Seaside - Monterey	324.8	0.1364	3.02	198,765	188,461	395	60,121	32	124,026	66	145	97
San Diego	2,085.3	0.8752	2.72	1,326,482	1,241,678	2,235	448,976	36	692,261	56	130	103
San Francisco	1,526.3	0.6405	2.39	1,829,504	1,686,707	2,597	409,758	24	1,048,001	62	178	108
San Jose	1,377.5	0.5781	2.83	995,733	948,274	1,546	380,282	40	489,214	52	128	114
Santa Barbara - Santa Maria - Lompoc	322.0	0.1352	2.68	271,654	257,532	434	76,508	30	167,451	65	129	88
Santa Cruz	216.8	0.0910	2.63	138,133	127,071	308	53,439	42	66,660	52	108	64
Santa Rosa - Petaluma	335.3	0.1408	2.56	184,351	168,646	382	66,163	39	92,389	55	92	79
Stockton	393.0	0.1649	2.74	189,824	176,005	406	88,093	50	81,903	47	98	73
Vallejo - Fairfield - Napa	379.5	0.1592	2.81	209,425	192,892	369	81,554	42	103,802	54	102	87
Visalia - Tulare - Porterville	279.2	0.1171	3.03	104,914	97,357	282	51,826	53	41,688	43	72	67
Yuba City	110.4	0.0463	2.75	47,437	43,382	113	15,944	37	23,972	55	85	71
Non-Metro Portion of State	1,275.1	0.5353	2.75	631,407	577,961	1,677	218,490	38	343,529	59	81	66
State Total	**25,806.6**	**10.8306**	**2.72**	**17,093,279**	**16,073,826**	**29,280**	**5,864,669**	**36**	**8,915,633**	**55**	**119**	**96**
COLORADO												
Boulder - Longmont	215.2	0.0903	2.60	156,390	147,077	263	49,638	34	85,846	58	103	91
Colorado Springs	345.0	0.1448	2.73	199,610	182,785	377	80,460	44	79,561	44	113	100
Denver	1,608.6	0.6750	2.52	1,169,432	1,084,144	1,693	342,792	32	600,517	55	113	115
Fort Collins - Loveland	174.8	0.0734	2.66	87,203	79,540	204	26,622	33	44,159	56	92	84
Greeley	138.0	0.0579	2.78	50,026	45,926	131	15,371	33	25,497	56	79	77
Pueblo	125.1	0.0525	2.65	59,518	51,787	157	17,332	33	28,751	56	76	72
Non-Metro Portion of State	618.0	0.2595	2.68	403,575	373,708	1,056	110,941	30	237,732	64	97	76
State Total	**3,224.7**	**1.3534**	**2.60**	**2,125,754**	**1,964,967**	**3,881**	**643,156**	**33**	**1,102,063**	**56**	**106**	**97**
CONNECTICUT												
Bridgeport - Stamford - Norwalk - Danbury	815.1	0.3421	2.81	528,306	501,093	919	132,501	26	297,439	59	106	95
Hartford - New Britain - Middletown - Bristol	1,060.7	0.4451	2.74	676,444	619,233	1,247	204,857	33	316,203	51	112	99
New Haven - Waterbury - Meriden	769.5	0.3229	2.72	443,069	410,038	931	143,662	35	226,204	55	100	81
New London - Norwich	248.8	0.1044	2.83	145,476	128,624	278	45,373	35	75,080	58	108	94
Non-Metro Portion of State	258.7	0.1086	2.76	104,568	96,552	288	30,073	31	56,060	58	74	77
State Total	**3,152.8**	**1.3231**	**2.76**	**1,897,863**	**1,755,540**	**3,663**	**556,466**	**32**	**970,986**	**55**	**104**	**91**
DELAWARE												
Wilmington	535.6	0.2249	2.83	248,822	228,952	505	102,194	45	111,099	49	91	106
Non-Metro Portion of State	211.9	0.0890	2.84	111,419	103,873	225	45,645	44	51,215	49	102	80
State Total	**615.0**	**0.2582**	**2.82**	**316,427**	**294,281**	**630**	**129,662**	**44**	**143,294**	**49**	**94**	**97**
DISTRICT OF COLUMBIA												
Washington	3,425.9	1.4378	2.72	2,302,682	2,218,903	3,380	801,701	36	1,050,943	47	122	142
State Total	**618.1**	**0.2594**	**2.47**	**653,950**	**611,035**	**907**	**160,488**	**26**	**309,881**	**51**	**277**	**175**
FLORIDA												
Bradenton	173.6	0.0729	2.38	106,026	101,870	168	38,151	37	53,145	52	107	85
Daytona Beach	305.7	0.1283	2.39	202,531	186,904	374	71,609	38	93,753	50	110	108
Fort Lauderdale - Hollywood - Pompano Beach	1,142.0	0.4793	2.39	891,002	821,286	1,293	244,011	30	493,899	60	138	106
Fort Myers - Cape Coral	256.3	0.1076	2.41	149,871	143,641	294	48,713	34	87,106	61	94	83

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STATE Metro Name	12/31/84			1984								
					Eating Place		Fast Food		Restaurant			
	Population (Thous.)	% Of U.S.	Average Household Size	Eating & Drinking Place Sales ($000)	Sales ($000)	Units	Sales ($000)	Market Share (%)	Sales ($000)	Market Share (%)	RAI	RGI
FLORIDA *continued*												
Fort Pierce	193.2	0.0811	2.51	80,490	77,316	159	32,794	42	38,966	50	71	88
Fort Walton Beach	128.8	0.0541	2.79	82,957	78,625	154	29,449	37	41,019	52	139	93
Gainesville	191.1	0.0802	2.72	113,125	107,710	211	40,663	38	56,075	52	102	97
Jacksonville	789.1	0.3312	2.70	428,227	404,444	834	198,404	49	167,643	41	115	108
Lakeland - Winter Haven	357.2	0.1499	2.73	154,249	147,871	292	77,030	52	60,652	41	77	98
Melbourne - Titusville - Palm Bay	330.0	0.1385	2.52	172,054	158,892	330	63,327	40	76,417	48	110	87
Miami - Hialeah	1,755.9	0.7370	2.70	1,054,545	995,497	1,757	340,245	34	515,045	52	120	138
Naples	112.5	0.0472	2.43	85,676	79,216	129	33,606	42	39,923	50	98	82
Ocala	159.7	0.0670	2.60	64,967	62,050	143	23,240	37	32,371	52	73	79
Orlando	836.5	0.3510	2.69	592,987	569,392	852	221,902	39	294,984	52	129	165
Panama City	109.8	0.0461	2.68	90,948	84,897	151	31,795	37	44,292	52	188	110
Pensacola	320.3	0.1343	2.78	157,877	143,271	272	73,028	51	52,156	36	96	112
Sarasota	241.6	0.1014	2.22	173,166	166,030	276	43,186	26	110,138	66	117	90
Tallahassee	207.9	0.0873	2.74	113,924	108,385	220	40,810	38	56,466	52	111	101
Tampa - St. Petersburg - Clearwater	1,837.4	0.7711	2.41	1,082,623	1,010,821	1,773	384,125	38	507,990	50	101	108
West Palm Beach - Boca Raton - Delray Beach	709.1	0.2976	2.37	501,314	467,208	739	123,020	26	307,025	66	111	114
Non-Metro Portion of State	1,008.3	0.4230	2.60	368,596	342,479	849	145,748	43	173,211	51	68	89
State Total	**11,166.0**	**4.6861**	**2.54**	**6,667,155**	**6,257,805**	**11,270**	**2,304,856**	**37**	**3,302,276**	**53**	**108**	**112**
GEORGIA												
Albany	117.8	0.0495	3.02	53,927	50,430	104	26,572	53	18,556	37	92	113
Athens	138.5	0.0582	2.76	68,430	63,129	146	33,319	53	23,270	37	96	84
Atlanta	2,392.8	1.0044	2.75	1,562,062	1,481,415	2,506	711,947	48	578,293	39	131	120
Augusta	372.4	0.1564	2.87	140,187	133,516	312	74,295	56	39,126	29	90	104
Columbus	241.0	0.1012	2.98	93,203	87,803	212	46,881	53	31,647	36	103	83
Macon - Warner Robins	276.4	0.1159	2.86	115,827	111,884	251	59,289	53	40,950	37	88	109
Savannah	230.0	0.0966	2.80	146,389	136,741	238	72,019	53	50,302	37	127	103
Non-Metro Portion of State	2,172.3	0.9113	2.94	597,023	584,973	1,669	356,154	61	190,387	33	67	100
State Total	**5,889.6**	**2.4718**	**2.85**	**2,758,998**	**2,632,448**	**5,384**	**1,373,925**	**52**	**967,137**	**37**	**102**	**109**
HAWAII												
Honolulu	818.5	0.3435	3.22	877,940	812,743	1,046	290,035	36	431,597	53	230	162
Non-Metro Portion of State	235.4	0.0988	3.14	232,918	226,786	350	66,672	29	149,359	66	131	215
State Total	**1,053.9**	**0.4423**	**3.21**	**1,110,858**	**1,039,529**	**1,396**	**356,707**	**34**	**580,956**	**56**	**198**	**175**
IDAHO												
Boise	195.3	0.0820	2.71	114,521	105,177	245	41,636	40	55,039	52	107	86
Non-Metro Portion of State	821.8	0.3449	2.98	274,972	245,071	861	98,797	40	132,703	54	64	75
State Total	**1,017.1**	**0.4269**	**2.92**	**389,493**	**350,248**	**1,106**	**140,433**	**40**	**187,742**	**54**	**73**	**78**
ILLINOIS												
Aurora - Elgin	339.8	0.1426	2.88	147,377	134,768	310	51,885	38	67,302	50	100	173
Bloomington - Normal	124.2	0.0521	2.76	70,021	63,435	147	25,937	41	31,274	49	122	86
Champaign - Urbana - Rantoul	168.9	0.0709	2.77	105,361	93,798	210	38,350	41	46,244	49	139	85
Chicago	6,056.9	2.5421	2.75	3,216,087	3,000,754	6,138	1,097,462	37	1,569,055	52	122	110
Davenport - Rock Island - Moline	388.3	0.1630	2.66	205,964	177,180	456	84,378	48	74,086	42	104	57
Decatur	131.5	0.0552	2.62	54,496	47,548	129	19,442	41	23,441	49	87	101
Joliet	382.8	0.1607	3.06	121,985	110,748	295	46,623	42	55,599	50	98	97
Kankakee	103.9	0.0436	2.82	45,598	42,940	108	17,558	41	21,169	49	104	76
Lake County	470.5	0.1975	3.04	193,367	178,923	476	63,243	35	99,331	56	108	92
Peoria	370.5	0.1554	2.71	155,010	139,689	376	60,766	44	70,954	51	92	99

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RGI Metro Report

	12/31/84			1984								
STATE Metro Name	Population (Thous.)	% Of U.S.	Average House-hold Size	Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Eating Place Units	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
ILLINOIS *continued*												
Rockford	281.5	0.1182	2.71	130,993	116,846	304	48,455	41	59,286	51	94	86
Springfield	194.4	0.0816	2.50	99,557	89,775	219	36,715	41	44,268	49	107	102
Non-Metro Portion of State	2,118.0	0.8887	2.65	697,333	610,788	2,203	316,357	52	255,670	42	75	65
State Total	**11,552.9**	**4.8485**	**2.74**	**5,384,840**	**4,925,911**	**11,705**	**1,980,077**	**40**	**2,458,294**	**50**	**107**	**97**
INDIANA												
Anderson	133.8	0.0562	2.74	59,404	53,199	139	25,766	48	22,087	42	73	81
Bloomington	101.0	0.0424	2.83	55,533	51,395	112	24,895	48	21,336	42	118	81
Elkhart - Goshen	143.3	0.0601	2.80	75,570	71,181	174	34,476	48	29,552	42	80	80
Evansville	284.1	0.1192	2.66	155,675	143,259	316	74,790	52	56,143	39	92	97
Fort Wayne	356.1	0.1494	2.79	196,542	182,195	406	66,628	37	101,204	56	111	90
Gary - Hammond	637.6	0.2676	2.94	335,691	313,093	630	152,495	49	135,530	43	101	89
Indianapolis	1,198.7	0.5030	2.73	713,599	673,579	1,247	322,078	48	263,387	39	123	110
Kokomo	103.3	0.0434	2.72	59,605	53,843	134	26,081	48	22,351	42	104	70
Lafayette - West Lafayette	122.5	0.0514	2.90	70,266	64,853	127	31,412	48	26,924	42	131	104
Muncie	124.6	0.0523	2.83	75,053	69,865	140	33,841	48	29,005	42	115	83
South Bend - Mishawaka	237.7	0.0998	2.73	132,958	122,256	287	50,620	41	63,356	52	109	82
Terre Haute	134.3	0.0564	2.74	78,609	72,081	156	34,914	48	29,925	42	101	77
Non-Metro Portion of State	1,800.9	0.7559	2.82	617,504	560,657	1,730	288,792	52	219,242	39	75	75
State Total	**5,556.9**	**2.3322**	**2.80**	**2,695,034**	**2,496,440**	**5,749**	**1,201,723**	**48**	**1,041,912**	**42**	**98**	**89**
IOWA												
Cedar Rapids	171.4	0.0720	2.59	81,522	72,430	182	32,348	45	33,722	47	83	98
Davenport - Rock Island - Moline	388.3	0.1630	2.66	205,964	177,180	456	84,378	48	74,086	42	104	57
Des Moines	380.5	0.1598	2.53	206,689	187,552	449	83,808	45	81,136	43	84	101
Dubuque	93.7	0.0393	2.94	42,542	37,253	100	16,637	45	17,344	47	90	85
Iowa City	85.7	0.0360	2.57	45,050	37,838	86	16,900	45	17,616	47	103	129
Sioux City	118.0	0.0495	2.65	51,580	45,139	129	20,080	44	21,211	47	72	87
Waterloo - Cedar Falls	163.5	0.0685	2.73	68,923	59,201	174	26,333	44	27,737	47	86	83
Non-Metro Portion of State	1,693.2	0.7106	2.63	546,193	470,926	2,039	202,050	43	235,950	50	60	62
State Total	**2,941.3**	**1.2344**	**2.63**	**1,169,263**	**1,021,029**	**3,430**	**451,831**	**44**	**480,047**	**47**	**72**	**73**
KANSAS												
Kansas City	1,473.1	0.6185	2.67	819,676	784,188	1,548	363,283	46	348,317	44	102	112
Lawrence	71.4	0.0300	2.82	38,019	34,475	79	17,704	51	13,824	40	112	83
Topeka	159.1	0.0668	2.56	90,953	85,157	206	43,733	51	34,146	40	94	93
Wichita	428.2	0.1797	2.61	218,285	210,151	563	99,526	47	85,846	41	99	89
Non-Metro Portion of State	1,240.9	0.5206	2.65	442,907	419,088	1,541	219,383	52	167,650	40	72	63
State Total	**2,448.0**	**1.0274**	**2.66**	**1,030,601**	**982,629**	**2,897**	**502,633**	**51**	**394,403**	**40**	**83**	**78**
KENTUCKY												
Clarksville - Hopkinsville	155.5	0.0652	3.10	58,827	54,155	134	28,009	52	20,937	39	90	84
Huntington - Ashland	341.0	0.1430	2.74	126,960	122,145	266	80,698	66	31,798	26	82	98
Lexington-Fayette	328.5	0.1378	2.69	202,883	195,983	379	102,321	52	74,520	38	117	110
Louisville	968.5	0.4065	2.74	522,453	485,308	895	265,106	55	171,665	35	102	113
Owensboro	87.7	0.0368	2.74	52,523	47,860	115	27,380	57	16,285	34	96	78
Non-Metro Portion of State	2,066.5	0.8673	2.87	505,040	493,339	1,476	312,540	63	151,740	31	56	92
State Total	**3,769.7**	**1.5821**	**2.82**	**1,419,549**	**1,350,460**	**3,136**	**771,749**	**57**	**468,383**	**35**	**78**	**100**
LOUISIANA												
Alexandria	143.0	0.0600	2.89	55,266	52,851	120	23,594	45	19,394	37	88	93

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RGI Metro Report

	12/31/84			1984								
					Eating Place		Fast Food		Restaurant			
STATE Metro Name	Population (Thous.)	% Of U.S.	Average Household Size	Eating & Drinking Place Sales ($000)	Sales ($000)	Units	Sales ($000)	Market Share (%)	Sales ($000)	Market Share (%)	RAI	RGI
LOUISIANA *continued*												
Baton Rouge	549.7	0.2307	2.91	287,511	267,303	440	148,344	55	87,592	33	93	122
Houma - Thibodaux	191.7	0.0805	3.07	159,846	153,573	169	63,003	41	38,039	25	154	109
Lafayette	215.3	0.0903	2.89	176,820	163,520	224	72,668	44	58,917	36	142	111
Lake Charles	176.7	0.0742	2.87	76,640	70,971	135	31,684	45	26,040	37	69	117
Monroe	145.2	0.0609	2.86	73,946	70,226	131	31,347	45	25,769	37	112	98
New Orleans	1,337.9	0.5615	2.74	956,741	885,805	1,288	348,764	39	394,136	44	122	131
Shreveport	357.2	0.1499	2.73	188,662	175,826	319	87,597	50	68,512	39	105	106
Non-Metro Portion of State	1,384.0	0.5808	3.00	382,522	357,406	853	148,465	42	90,436	25	63	102
State Total	**4,500.7**	**1.8888**	**2.87**	**2,357,954**	**2,197,481**	**3,679**	**955,466**	**43**	**808,835**	**37**	**100**	**116**
MAINE												
Bangor	138.5	0.0581	2.92	61,363	59,902	132	23,431	39	31,861	53	82	101
Lewiston - Auburn	100.5	0.0422	2.75	37,832	36,180	100	14,150	39	19,244	53	62	78
Portland	223.9	0.0940	2.65	162,891	155,056	286	52,299	34	92,637	60	95	92
Non-Metro Portion of State	702.9	0.2950	2.77	279,358	273,826	774	107,111	39	145,666	53	83	79
State Total	**1,165.8**	**0.4893**	**2.76**	**541,444**	**524,964**	**1,292**	**196,991**	**38**	**289,408**	**55**	**84**	**84**
MARYLAND												
Baltimore	2,265.4	0.9508	2.78	1,253,969	1,114,056	2,018	473,711	43	462,310	41	104	111
Cumberland	105.9	0.0444	2.69	42,942	40,124	111	17,826	44	17,086	43	87	78
Hagerstown	116.6	0.0490	2.80	38,229	31,341	99	13,456	43	13,636	44	64	103
Non-Metro Portion of State	315.3	0.1322	2.78	194,001	182,588	363	73,208	40	99,697	55	111	91
State Total	**4,381.6**	**1.8389**	**2.80**	**2,409,392**	**2,214,267**	**3,938**	**931,807**	**42**	**974,174**	**44**	**98**	**110**
MASSACHUSETTS												
Boston - Lawrence - Salem - Lowell - Brockton	3,678.4	1.5438	2.71	3,010,928	2,806,094	4,054	776,403	28	1,591,908	57	150	114
New Bedford - Fall River - Attleboro	489.5	0.2054	2.76	256,164	233,439	470	92,728	40	117,328	50	70	89
Pittsfield	142.9	0.0600	2.63	90,149	81,689	181	24,184	30	51,203	63	88	89
Springfield	583.1	0.2447	2.76	352,852	319,445	595	97,490	31	189,500	59	103	91
Worcester - Fitchburg - Leominster	657.7	0.2761	2.76	357,644	330,337	633	92,042	28	194,127	59	114	97
Non-Metro Portion of State	256.3	0.1075	2.47	289,339	269,750	536	62,607	23	195,844	73	152	69
State Total	**5,807.9**	**2.4375**	**2.71**	**4,357,076**	**4,040,754**	**6,469**	**1,145,454**	**28**	**2,339,910**	**58**	**131**	**104**
MICHIGAN												
Ann Arbor	270.4	0.1134	2.77	148,163	138,774	279	55,990	40	69,558	50	135	120
Battle Creek	137.7	0.0578	2.68	64,039	58,140	152	23,458	40	29,140	50	112	83
Benton Harbor	165.9	0.0696	2.74	68,160	61,960	171	24,999	40	31,056	50	102	80
Detroit	4,359.4	1.8297	2.76	2,099,953	1,920,100	4,002	748,869	39	962,982	50	101	102
Flint	439.4	0.1844	2.78	220,527	192,874	392	86,783	45	85,845	45	108	103
Grand Rapids	623.2	0.2615	2.81	298,969	273,248	535	97,749	36	146,186	53	116	117
Jackson	149.3	0.0626	2.89	57,844	52,204	133	21,064	40	26,167	50	104	92
Kalamazoo	214.6	0.0901	2.73	123,825	117,377	258	48,572	41	55,116	47	150	92
Lansing - East Lansing	424.6	0.1783	2.85	203,466	185,222	383	85,992	46	84,840	46	103	108
Muskegon	154.6	0.0649	2.80	62,653	56,067	145	22,621	40	28,103	50	96	89
Saginaw - Bay City - Midland	416.1	0.1747	2.87	202,513	181,734	336	73,119	40	92,408	51	99	110
Non-Metro Portion of State	1,825.0	0.7658	2.83	581,824	500,700	1,807	203,012	41	269,413	54	67	69
State Total	**9,180.2**	**3.8528**	**2.79**	**4,131,936**	**3,738,400**	**8,593**	**1,492,228**	**40**	**1,880,814**	**50**	**98**	**96**

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RGI Metro Report

	12/31/84			1984								
					Eating Place		Fast Food		Restaurant			
STATE Metro Name	Population (Thous.)	% Of U.S.	Average House-hold Size	Eating & Drinking Place Sales ($000)	Sales ($000)	Units	Sales ($000)	Market Share (%)	Sales ($000)	Market Share (%)	RAI	RGI
MINNESOTA												
Duluth	259.8	0.1091	2.65	128,442	107,860	297	36,311	34	65,536	61	86	75
Fargo - Moorhead	145.9	0.0613	2.75	84,873	73,086	154	29,304	40	39,495	54	120	105
Minneapolis - St. Paul	2,218.0	0.9307	2.68	1,273,084	1,153,729	2,111	393,765	34	655,397	57	104	129
Rochester	95.4	0.0400	2.72	54,169	50,553	97	17,551	35	29,120	58	91	170
St. Cloud	175.2	0.0736	3.20	69,229	58,834	145	20,476	35	33,976	58	81	88
Non-Metro Portion of State	1,475.7	0.6193	2.78	529,807	463,937	1,606	160,256	35	277,730	60	71	64
State Total	**4,183.6**	**1.7557**	**2.73**	**2,032,469**	**1,818,819**	**4,206**	**620,602**	**34**	**1,053,308**	**58**	**90**	**101**
MISSISSIPPI												
Biloxi - Gulfport	195.4	0.0821	2.84	109,813	103,192	209	56,525	55	36,304	35	116	95
Jackson	391.1	0.1640	2.86	147,035	144,609	328	74,878	52	51,924	36	82	119
Pascagoula	126.2	0.0530	2.97	41,982	39,677	85	21,734	55	13,958	35	62	126
Non-Metro Portion of State	1,854.4	0.7783	2.94	397,254	385,277	1,246	218,781	57	123,338	32	49	96
State Total	**2,627.2**	**1.1026**	**2.92**	**704,789**	**681,460**	**1,895**	**377,630**	**55**	**227,961**	**33**	**59**	**102**
MISSOURI												
Columbia	107.4	0.0450	2.80	51,631	48,898	101	22,515	46	20,962	43	94	113
Joplin	132.9	0.0557	2.67	62,401	59,596	157	27,443	46	25,549	43	81	64
Kansas City	1,473.1	0.6185	2.67	819,676	784,188	1,548	363,283	46	348,317	44	102	112
St. Joseph	86.8	0.0365	2.70	43,387	39,917	94	18,379	46	17,113	43	73	86
St. Louis	2,398.9	1.0067	2.77	1,275,534	1,176,296	2,381	558,567	47	464,235	39	92	104
Springfield	222.6	0.0934	2.67	117,891	110,103	260	53,102	48	41,637	38	90	85
Non-Metro Portion of State	1,761.3	0.7392	2.78	495,493	465,913	1,751	226,128	49	204,349	44	62	63
State Total	**5,046.6**	**2.1180**	**2.74**	**2,389,506**	**2,250,102**	**5,254**	**1,034,073**	**46**	**956,094**	**42**	**87**	**92**
MONTANA												
Billings	120.1	0.0504	2.56	84,220	69,461	162	25,858	37	39,735	57	95	88
Great Falls	80.2	0.0337	2.58	45,606	36,678	108	13,653	37	20,983	57	100	77
Non-Metro Portion of State	627.3	0.2632	2.65	316,820	240,652	858	86,472	36	143,541	60	74	72
State Total	**827.6**	**0.3473**	**2.63**	**446,646**	**346,791**	**1,128**	**125,983**	**36**	**204,259**	**59**	**80**	**75**
NEBRASKA												
Lincoln	205.3	0.0861	2.60	107,150	95,057	230	41,227	43	47,255	50	112	101
Omaha	608.7	0.2553	2.68	333,973	294,038	630	127,212	43	146,201	50	98	105
Non-Metro Portion of State	874.4	0.3672	2.66	318,444	266,372	1,090	111,643	42	136,215	51	76	59
State Total	**1,619.4**	**0.6797**	**2.66**	**727,182**	**627,109**	**1,875**	**266,558**	**43**	**316,856**	**51**	**90**	**79**
NEVADA												
Las Vegas	540.4	0.2267	2.52	396,279	346,816	536	124,761	36	173,642	50	101	644
Reno	215.0	0.0903	2.38	159,252	145,649	256	51,598	35	83,694	57	95	368
Non-Metro Portion of State	165.0	0.0692	2.56	86,938	73,475	207	26,400	36	39,394	54	66	436
State Total	**920.4**	**0.3862**	**2.49**	**642,469**	**565,940**	**999**	**202,759**	**36**	**296,730**	**52**	**93**	**530**
NEW HAMPSHIRE												
Manchester - Nashua	295.3	0.1239	2.78	179,555	175,631	329	55,452	32	103,474	59	101	106
Portsmouth - Dover - Rochester	302.5	0.1270	2.80	181,339	175,383	341	52,010	30	108,477	62	92	93
Non-Metro Portion of State	384.6	0.1614	2.70	206,429	203,194	515	60,257	30	125,675	62	76	85
State Total	**982.4**	**0.4123**	**2.75**	**567,323**	**554,208**	**1,185**	**167,719**	**30**	**337,626**	**61**	**88**	**93**

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RGI Metro Report

	12/31/84			1984								
					Eating Place		Fast Food		Restaurant			
STATE Metro Name	Population (Thous.)	% Of U.S.	Average Household Size	Eating & Drinking Place Sales ($000)	Sales ($000)	Units	Sales ($000)	Market Share (%)	Sales ($000)	Market Share (%)	RAI	RGI
NEW JERSEY												
Atlantic City	302.8	0.1271	2.58	295,666	256,606	477	81,051	32	149,743	58	132	226
Bergen - Passaic	1,281.1	0.5376	2.73	796,727	719,985	1,280	194,470	27	402,262	56	97	106
Jersey City	548.2	0.2301	2.61	182,202	144,142	426	50,255	35	76,371	53	54	110
Middlesex - Somerset - Hunterdon	920.0	0.3861	2.87	467,731	393,708	842	122,857	31	221,243	56	74	112
Monmouth - Ocean	932.2	0.3912	2.68	503,296	428,547	896	138,038	32	253,668	59	83	88
Newark	1,868.4	0.7842	2.79	901,796	777,479	1,614	234,119	30	390,858	50	82	122
Trenton	312.4	0.1311	2.81	166,470	143,816	289	44,874	31	77,509	54	87	122
Vineland - Millville - Bridgeton	137.6	0.0578	2.91	45,101	37,680	110	12,010	32	20,459	54	50	94
State Total	**7,545.8**	**3.1669**	**2.77**	**3,921,565**	**3,394,956**	**6,833**	**1,069,006**	**31**	**1,841,823**	**54**	**85**	**120**
NEW MEXICO												
Albuquerque	465.1	0.1952	2.64	282,406	265,571	558	110,694	42	122,575	46	110	91
Las Cruces	110.9	0.0466	2.94	46,772	43,795	102	19,181	44	20,260	46	104	90
Santa Fe	102.5	0.0431	2.66	61,633	59,181	141	27,175	46	27,425	46	109	91
Non-Metro Portion of State	772.6	0.3241	2.95	316,037	284,375	813	129,663	46	132,767	47	71	78
State Total	**1,451.1**	**0.6090**	**2.82**	**706,848**	**653,022**	**1,614**	**286,713**	**44**	**303,027**	**46**	**88**	**85**
NEW YORK												
Albany - Schenectady - Troy	863.5	0.3622	2.70	373,836	339,024	945	114,753	34	192,586	57	74	89
Binghamton	268.3	0.1126	2.75	115,341	101,759	[illegible]	37,160	37	57,803	57	75	101
Buffalo	990.2	0.4156	2.72	505,335	443,155	[illegible]	158,672	36	221,524	50	84	77
Elmira	96.5	0.0405	2.80	40,657	36,123	[illegible]	10,460	29	19,929	55	88	88
Glens Falls	115.6	0.0485	2.89	57,449	52,510	185	15,205	29	28,970	55	80	67
Nassau - Suffolk	2,686.3	1.1274	3.12	1,411,664	1,302,330	2,698	388,873	30	689,251	53	84	87
New York	8,391.1	3.5216	2.53	4,945,191	4,645,074	8,491	1,133,091	24	2,671,287	58	140	114
Niagara Falls	219.3	0.0921	2.75	89,572	79,926	275	30,050	38	37,261	47	76	72
Orange County	278.9	0.1171	3.05	93,016	85,214	278	31,218	37	46,306	54	57	78
Poughkeepsie	262.0	0.1099	2.96	97,330	88,374	257	25,591	29	48,755	55	66	96
Rochester	998.2	0.4189	2.75	504,140	461,488	993	152,662	33	251,964	55	95	101
Syracuse	659.3	0.2766	2.82	304,007	268,151	677	89,811	33	147,810	55	78	97
Utica - Rome	322.6	0.1353	2.82	124,169	114,125	332	38,945	34	59,718	52	74	78
Non-Metro Portion of State	1,763.7	0.7405	2.87	638,278	558,472	1,812	212,271	38	290,775	52	74	87
State Total	**17,915.5**	**7.5188**	**2.71**	**9,299,985**	**8,575,725**	**18,445**	**2,438,762**	**28**	**4,763,939**	**56**	**104**	**99**
NORTH CAROLINA												
Asheville	166.7	0.0700	2.57	97,243	94,261	187	50,877	54	34,797	37	104	98
Burlington	99.5	0.0418	2.66	56,724	56,132	100	30,295	54	20,720	37	96	99
Charlotte - Gastonia - Rock Hill	1,031.6	0.4329	2.74	500,340	487,559	1,000	269,025	55	175,607	36	83	109
Fayetteville	263.4	0.1105	3.18	111,925	106,233	225	57,337	54	39,216	37	104	93
Greensboro - Winston-Salem - High Point	891.6	0.3742	2.67	471,419	462,374	931	226,309	49	166,998	36	110	99
Hickory	214.7	0.0901	2.75	93,411	92,374	203	50,519	55	34,068	37	88	108
Jacksonville	120.9	0.0508	3.55	46,763	40,330	95	21,767	54	14,888	37	93	76
Raleigh - Durham	617.0	0.2588	2.69	346,086	336,541	651	168,143	50	128,565	38	108	109
Wilmington	111.5	0.0468	2.65	73,833	71,768	149	38,735	54	26,493	37	115	80
Non-Metro Portion of State	2,815.7	1.1819	2.81	934,545	918,594	2,410	523,053	57	338,251	37	74	90
State Total	**6,215.9**	**2.6088**	**2.77**	**2,683,168**	**2,618,415**	**5,868**	**1,410,869**	**54**	**962,472**	**37**	**88**	**97**
NORTH DAKOTA												
Bismarck	90.1	0.0377	2.85	47,238	42,975	79	18,042	42	22,685	53	113	136
Fargo - Moorhead	145.9	0.0613	2.75	84,873	73,086	154	29,304	40	39,495	54	120	105
Grand Forks	70.0	0.0294	2.99	28,913	24,034	69	10,091	42	12,687	53	102	108
Non-Metro Portion of State	435.7	0.1828	2.86	159,465	124,327	465	47,773	38	69,242	56	72	71
State Total	**692.4**	**0.2905**	**2.85**	**297,050**	**245,420**	**716**	**98,613**	**40**	**133,163**	**54**	**91**	**89**

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RGI Metro Report

	12/31/84			1984								
					Eating Place		Fast Food		Restaurant			
STATE Metro Name	Population (Thous.)	% Of U.S.	Average Household Size	Eating & Drinking Place Sales ($000)	Sales ($000)	Units	Sales ($000)	Market Share (%)	Sales ($000)	Market Share (%)	RAI	RGI
OHIO												
Akron	649.6	0.2726	2.70	333,289	307,994	666	123,225	40	166,178	54	96	93
Canton	407.7	0.1711	2.77	185,610	170,835	442	74,597	44	87,480	51	84	77
Cincinnati	1,403.5	0.5891	2.70	800,798	729,443	1,428	306,880	42	346,359	47	106	101
Cleveland	1,859.1	0.7803	2.63	985,155	897,161	1,824	354,549	40	454,048	51	95	101
Columbus	1,281.2	0.5379	2.65	716,689	663,392	1,426	325,539	49	279,077	42	108	96
Dayton - Springfield	926.9	0.3890	2.64	462,196	425,824	983	214,677	50	169,455	40	98	92
Hamilton - Middletown	271.9	0.1142	2.84	105,791	95,949	229	43,773	46	43,535	45	85	91
Lima	157.9	0.0663	2.80	74,545	69,548	182	31,729	46	31,555	45	98	75
Lorain - Elyria	274.4	0.1152	2.88	94,131	82,069	222	37,440	46	37,236	45	68	102
Mansfield	130.2	0.0546	2.71	57,046	51,863	150	23,661	46	23,531	45	94	76
Parkersburg - Marietta	159.0	0.0667	2.71	69,568	63,362	154	32,871	52	24,888	39	88	91
Steubenville - Weirton	156.4	0.0657	2.71	51,332	45,218	147	23,079	51	18,130	40	62	80
Toledo	618.4	0.2595	2.70	379,316	347,003	666	135,783	39	175,346	51	104	93
Youngstown - Warren	518.5	0.2176	2.72	218,219	195,415	515	95,045	49	83,216	43	86	80
Non-Metro Portion of State	2,321.0	0.9739	2.80	728,687	678,487	2,231	324,573	48	278,886	41	73	75
State Total	**10,813.8**	**4.5384**	**2.71**	**5,083,628**	**4,656,794**	**10,944**	**2,064,706**	**44**	**2,150,581**	**46**	**93**	**90**
OKLAHOMA												
Enid	66.1	0.0277	2.59	42,352	40,276	89	20,275	50	14,711	37	110	71
Lawton	116.9	0.0490	3.13	62,134	58,503	109	29,450	50	21,369	37	107	90
Oklahoma City	971.8	0.4079	2.63	792,565	766,190	1,292	364,710	48	293,927	38	142	88
Tulsa	738.4	0.3098	2.63	453,135	439,588	845	224,235	51	154,387	35	117	92
Non-Metro Portion of State	1,420.3	0.5962	2.68	511,709	501,097	1,370	261,366	52	182,121	36	76	72
State Total	**3,348.6**	**1.4054**	**2.67**	**1,866,818**	**1,810,499**	**3,736**	**902,476**	**50**	**668,285**	**37**	**108**	**82**
OREGON												
Eugene - Springfield	269.1	0.1129	2.58	143,784	132,725	337	61,411	46	62,812	47	112	81
Medford	137.5	0.0578	2.66	64,210	58,730	157	22,342	38	31,856	54	106	73
Portland	1,140.6	0.4786	2.56	771,397	699,383	1,371	242,103	35	396,239	57	137	97
Salem	255.6	0.1073	2.73	120,681	110,469	308	47,042	43	52,400	47	119	59
Non-Metro Portion of State	890.5	0.3737	2.70	439,163	403,330	1,254	159,555	40	220,395	55	97	60
State Total	**2,693.3**	**1.1303**	**2.63**	**1,539,235**	**1,404,637**	**3,427**	**532,453**	**38**	**763,702**	**54**	**117**	**78**
PENNSYLVANIA												
Allentown - Bethlehem	654.6	0.2748	2.64	294,729	271,418	663	100,101	37	132,004	49	88	91
Altoona	136.4	0.0573	2.68	48,746	44,025	130	16,780	38	21,930	50	65	84
Beaver County	201.5	0.0845	2.74	57,023	46,734	137	21,416	46	22,084	47	50	116
Erie	285.6	0.1198	2.78	126,401	112,139	245	50,515	45	51,747	46	86	104
Harrisburg - Lebanon - Carlisle	575.6	0.2416	2.63	287,526	258,831	581	104,075	40	126,682	49	79	112
Johnstown	263.9	0.1108	2.75	67,054	57,766	186	27,846	48	26,808	46	56	99
Lancaster	382.8	0.1607	2.80	186,829	171,924	366	59,362	35	104,218	61	87	114
Philadelphia	4,770.0	2.0019	2.75	2,377,929	2,096,760	4,040	754,682	36	1,032,899	49	96	114
Pittsburgh	2,175.0	0.9128	2.59	1,081,061	958,610	2,036	338,675	35	497,603	52	95	97
Reading	321.8	0.1350	2.61	160,859	147,028	349	56,950	39	81,301	55	96	91
Scranton - Wilkes-Barre	737.1	0.3094	2.65	312,761	287,367	766	108,716	38	137,311	48	85	94
Sharon	128.7	0.0540	2.75	49,473	43,490	126	16,579	38	21,663	50	84	71
State College	116.0	0.0487	2.98	56,808	54,281	112	20,689	38	27,040	50	116	81
Williamsport	119.9	0.0503	2.72	42,842	36,296	115	13,835	38	18,081	50	60	88
York	397.6	0.1669	2.70	154,985	140,555	388	56,923	40	69,304	49	82	98
Non-Metro Portion of State	1,874.5	0.7865	2.75	565,479	502,373	1,584	207,954	41	227,590	45	69	75
State Total	**11,965.4**	**5.0217**	**2.69**	**5,327,320**	**4,752,922**	**10,985**	**1,771,480**	**37**	**2,356,607**	**50**	**87**	**98**
RHODE ISLAND												
Providence - Pawtucket - Woonsocket	878.7	0.3687	2.76	440,653	399,833	992	130,833	33	229,334	57	98	83

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	12/31/84			1984								
STATE Metro Name	Population (Thous.)	% Of U.S.	Average House-hold Size	Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Eating Place Units	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
RHODE ISLAND *continued*												
Non-Metro Portion of State	84.3	0.0354	2.87	80,521	74,871	138	21,031	28	46,617	62	230	68
State Total	**963.0**	**0.4041**	**2.77**	**521,174**	**474,704**	**1,130**	**151,864**	**32**	**275,951**	**58**	**108**	**81**
SOUTH CAROLINA												
Anderson	144.2	0.0606	2.72	46,522	46,349	127	24,452	53	16,629	36	73	92
Charleston	484.0	0.2032	2.99	232,541	222,313	367	111,656	50	73,599	33	102	122
Charlotte - Gastonia - Rock Hill	1,031.6	0.4329	2.74	500,340	487,559	1,000	269,025	55	175,607	36	83	109
Columbia	440.3	0.1848	2.86	212,670	207,289	424	111,726	54	69,976	34	119	104
Florence	117.2	0.0492	2.91	40,961	40,477	103	21,355	53	14,520	36	77	115
Greenville - Spartanburg	605.0	0.2538	2.72	257,667	251,817	627	144,533	57	82,215	33	87	91
Non-Metro Portion of State	1,333.4	0.5595	2.91	473,794	455,762	1,110	210,793	46	194,046	43	80	118
State Total	**3,353.4**	**1.4074**	**2.86**	**1,343,043**	**1,301,125**	**2,924**	**665,933**	**51**	**476,479**	**37**	**88**	**109**
SOUTH DAKOTA												
Rapid City	75.3	0.0316	2.67	47,376	43,709	109	14,877	34	25,689	59	103	91
Sioux Falls	119.6	0.0502	2.59	65,396	56,795	132	20,453	36	32,597	57	100	112
Non-Metro Portion of State	518.8	0.2177	2.77	178,126	146,810	584	50,666	35	87,405	60	74	64
State Total	**713.7**	**0.2995**	**2.73**	**290,898**	**247,314**	**825**	**85,996**	**35**	**145,691**	**59**	**83**	**76**
TENNESSEE												
Chattanooga	433.6	0.1820	2.73	179,364	175,161	407	90,379	52	71,477	41	71	105
Clarksville - Hopkinsville	155.5	0.0652	3.10	58,827	54,155	134	28,009	52	20,937	39	90	84
Jackson	76.3	0.0320	2.71	39,044	37,424	87	19,037	51	15,523	41	93	89
Johnson City - Kingsport - Bristol	446.7	0.1874	2.73	158,317	155,403	355	94,436	61	42,875	28	73	61
Knoxville	591.3	0.2481	2.64	398,492	384,727	637	181,832	47	164,074	43	108	110
Memphis	927.2	0.3891	2.85	411,332	399,282	852	210,150	53	139,398	35	83	112
Nashville	899.8	0.3777	2.74	472,872	461,017	922	193,753	42	220,412	48	101	115
Non-Metro Portion of State	1,608.0	0.6750	2.79	367,025	357,015	1,229	182,666	51	148,891	42	53	90
State Total	**4,759.9**	**1.9977**	**2.75**	**1,988,449**	**1,929,011**	**4,373**	**941,486**	**49**	**796,374**	**41**	**82**	**101**
TEXAS												
Abilene	120.7	0.0506	2.85	90,576	85,211	144	38,520	45	34,651	41	120	80
Amarillo	193.3	0.0811	2.67	140,180	130,415	258	58,953	45	53,031	41	122	85
Austin	657.0	0.2757	2.67	498,256	452,581	831	200,828	44	196,987	44	137	95
Beaumont - Port Arthur	397.4	0.1669	2.84	207,230	187,982	341	84,470	45	77,862	41	92	108
Brazoria	203.1	0.0852	3.12	68,132	64,855	161	35,521	55	22,250	34	60	121
Brownsville - Harlingen	241.5	0.1013	3.56	113,663	105,476	233	47,682	45	42,891	41	87	97
Bryan - College Station	111.3	0.0468	2.80	87,437	79,432	139	35,909	45	32,300	41	121	73
Corpus Christi	358.0	0.1503	3.10	223,382	198,159	386	94,737	48	81,048	41	96	93
Dallas	2,238.4	0.9395	2.71	1,732,211	1,623,373	2,401	676,889	42	694,709	43	136	126
El Paso	538.3	0.2259	3.41	251,954	219,251	443	102,801	47	83,005	38	113	102
Fort Worth - Arlington	1,141.0	0.4788	2.76	767,347	712,894	1,199	334,675	47	275,344	39	112	105
Galveston - Texas City	214.8	0.0902	2.80	133,295	126,229	224	57,063	45	51,328	41	95	106
Houston	3,176.8	1.3333	2.78	2,278,330	2,105,879	3,116	845,781	40	938,911	45	119	127
Killeen - Temple	237.1	0.0995	3.18	112,353	110,107	200	49,777	45	44,772	41	117	84
Laredo	117.1	0.0491	3.83	57,258	55,755	96	25,205	45	22,671	41	71	91
Longview - Marshall	169.7	0.0712	2.81	109,357	103,351	210	46,719	45	42,027	41	98	77
Lubbock	225.0	0.0944	2.86	146,877	136,105	264	61,539	45	52,147	38	123	89
McAllen - Edinburg - Mission	340.8	0.1431	3.72	121,562	113,578	241	48,320	43	39,002	34	83	81
Midland	104.8	0.0440	2.77	85,896	78,392	117	35,439	45	31,877	41	101	96
Odessa	137.5	0.0578	2.79	131,928	116,834	160	52,814	45	47,509	41	122	90
San Angelo	95.5	0.0401	2.78	67,664	63,644	107	28,771	45	25,882	41	114	79
San Antonio	1,190.7	0.4998	3.02	762,439	700,662	1,219	306,031	44	270,068	39	119	103
Sherman - Denison	95.7	0.0402	2.64	45,549	44,081	94	19,927	45	17,924	41	99	76
Texarkana	119.5	0.0502	2.76	59,686	57,824	121	28,139	49	22,380	39	96	82

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	12/31/84			1984								
					Eating Place		Fast Food		Restaurant			
STATE Metro Name	Population (Thous.)	% Of U.S.	Average Household Size	Eating & Drinking Place Sales ($000)	Sales ($000)	Units	Sales ($000)	Market Share (%)	Sales ($000)	Market Share (%)	RAI	RGI
TEXAS *continued*												
Tyler	149.0	0.0625	2.78	73,487	73,294	143	33,134	45	29,804	41	106	86
Victoria	77.6	0.0325	2.97	46,137	40,142	91	18,147	45	16,323	41	88	73
Waco	185.9	0.0780	2.76	105,819	97,735	201	44,181	45	39,744	41	104	91
Wichita Falls	124.3	0.0522	2.81	77,851	72,954	144	32,979	45	29,665	41	121	89
Non-Metro Portion of State	3,244.6	1.3614	2.86	1,035,690	995,836	2,999	540,409	54	386,078	39	67	63
State Total	**16,167.6**	**6.7853**	**2.86**	**9,613,868**	**8,935,932**	**16,242**	**3,976,082**	**44**	**3,696,774**	**41**	**107**	**100**
UTAH												
Provo - Orem	255.7	0.1073	3.71	52,784	51,382	175	24,109	47	23,928	47	63	90
Salt Lake City - Ogden	1,032.7	0.4334	3.09	381,863	368,349	875	173,323	47	165,821	45	80	113
Non-Metro Portion of State	392.1	0.1645	3.31	121,229	115,630	403	48,112	42	64,341	56	66	78
State Total	**1,680.5**	**0.7052**	**3.22**	**555,876**	**535,361**	**1,453**	**245,544**	**46**	**254,090**	**47**	**74**	**101**
VERMONT												
Burlington	126.0	0.0528	2.84	87,479	82,746	150	23,416	28	50,545	61	113	110
Non-Metro Portion of State	407.4	0.1711	2.72	207,133	189,256	552	53,748	28	115,975	61	83	83
State Total	**533.4**	**0.2239**	**2.74**	**294,612**	**272,002**	**702**	**77,164**	**28**	**166,520**	**61**	**91**	**89**
VIRGINIA												
Charlottesville	120.7	0.0506	2.85	59,173	57,687	126	26,831	47	24,353	42	82	110
Danville	112.5	0.0472	2.81	37,721	37,144	103	17,264	46	15,675	42	78	93
Lynchburg	145.0	0.0609	2.95	61,428	60,691	144	28,211	46	25,610	42	85	96
Norfolk - Virginia Beach - Newport News	1,260.9	0.5294	3.00	604,894	588,388	1,316	271,224	46	265,395	45	115	105
Richmond - Petersburg	799.9	0.3360	2.62	365,303	358,819	886	179,263	50	143,781	40	89	99
Roanoke	224.3	0.0942	2.69	111,853	108,503	231	50,480	47	45,832	42	93	109
Non-Metro Portion of State	1,670.2	0.7005	2.95	460,858	454,604	1,362	235,087	52	159,255	35	64	100
State Total	**5,692.4**	**2.3890**	**2.87**	**2,516,820**	**2,472,867**	**5,414**	**1,120,206**	**45**	**1,056,762**	**43**	**93**	**110**
WASHINGTON												
Bellingham	113.9	0.0478	2.62	75,478	68,128	157	23,886	35	38,781	57	113	65
Bremerton	169.5	0.0712	2.75	75,932	65,066	133	22,812	35	37,038	57	96	92
Olympia	140.7	0.0591	2.59	77,565	71,968	157	25,233	35	40,967	57	95	76
Richland - Kennewick - Pasco	153.0	0.0642	2.72	69,193	61,195	149	21,455	35	34,833	57	80	110
Seattle	1,699.9	0.7134	2.51	1,347,912	1,255,926	2,055	397,573	32	710,290	57	133	102
Spokane	354.4	0.1487	2.57	211,573	196,441	374	78,984	40	103,679	53	107	93
Tacoma	519.1	0.2179	2.67	275,378	251,097	457	96,518	38	142,117	57	113	88
Vancouver	208.2	0.0874	2.70	98,020	85,913	193	36,594	43	45,437	53	103	90
Yakima	180.7	0.0758	2.72	84,863	76,175	188	26,706	35	43,363	57	85	75
Non-Metro Portion of State	847.0	0.3554	2.61	411,896	363,350	987	131,689	36	223,556	62	81	70
State Total	**4,386.4**	**1.8409**	**2.59**	**2,727,810**	**2,495,259**	**4,850**	**861,450**	**35**	**1,420,061**	**57**	**111**	**90**
WEST VIRGINIA												
Charleston	269.3	0.1131	2.58	107,953	103,670	251	57,596	56	37,008	36	73	101
Huntington - Ashland	341.0	0.1430	2.74	126,960	122,145	266	80,698	66	31,798	26	82	98
Parkersburg - Marietta	159.0	0.0667	2.71	69,568	63,362	154	32,871	52	24,888	39	88	91
Steubenville - Weirton	156.4	0.0657	2.71	51,332	45,218	147	23,079	51	18,130	40	62	80
Wheeling	183.1	0.0768	2.63	70,697	63,228	162	32,445	51	25,181	40	72	80
Non-Metro Portion of State	1,258.9	0.5282	2.78	298,531	286,652	904	164,666	57	100,503	35	54	95
State Total	**1,972.5**	**0.8278**	**2.72**	**601,483**	**572,038**	**1,551**	**331,592**	**58**	**194,530**	**34**	**65**	**95**

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	12/31/84			1984								
					Eating Place		Fast Food		Restaurant			
STATE Metro Name	Population (Thous.)	% Of U.S.	Average Household Size	Eating & Drinking Place Sales ($000)	Sales ($000)	Units	Sales ($000)	Market Share (%)	Sales ($000)	Market Share (%)	RAI	RGI
WISCONSIN												
Appleton - Oshkosh - Neenah	298.4	0.1252	2.76	135,123	112,759	310	44,542	40	57,432	51	98	93
Eau Claire	136.9	0.0574	2.81	64,477	51,811	135	18,569	36	30,023	58	101	90
Green Bay	182.0	0.0764	2.73	102,572	88,390	206	31,604	36	51,106	58	142	92
Janesville - Beloit	139.5	0.0585	2.71	66,529	53,643	161	19,179	36	31,015	58	86	72
Kenosha	122.5	0.0514	2.72	60,463	48,068	120	17,188	36	27,790	58	79	87
La Crosse	93.4	0.0392	2.72	55,465	45,949	115	16,429	36	26,567	58	105	92
Madison	334.7	0.1404	2.54	230,999	196,791	416	73,640	37	115,380	59	134	101
Milwaukee	1,390.9	0.5839	2.66	731,403	628,858	1,442	230,178	37	348,632	55	99	99
Racine	173.2	0.0727	2.78	72,884	62,448	180	22,329	36	36,105	58	81	86
Sheboygan	101.4	0.0426	2.74	39,339	32,532	100	11,633	36	18,808	58	81	87
Wausau	114.6	0.0481	2.80	34,252	29,324	98	10,485	36	16,953	58	69	93
Non-Metro Portion of State	1,611.0	0.6761	2.75	654,629	529,346	1,906	159,704	30	344,118	65	84	66
State Total	**4,788.3**	**2.0096**	**2.71**	**2,293,836**	**1,915,015**	**5,290**	**669,834**	**35**	**1,123,326**	**59**	**96**	**84**
WYOMING												
Casper	76.2	0.0319	2.67	45,454	40,392	87	16,674	41	20,869	52	81	133
Cheyenne	72.8	0.0305	2.61	45,613	41,442	85	16,554	40	21,236	51	123	120
Non-Metro Portion of State	366.6	0.1540	2.79	235,104	191,100	464	77,232	40	99,061	52	82	116
State Total	**515.6**	**0.2164**	**2.75**	**326,171**	**272,934**	**636**	**110,460**	**40**	**141,166**	**52**	**86**	**119**
United States Total	**238,274.7**	**100.0000**	**2.74**	**124,035,013**	**114,779,696**	**241,691**	**45,622,567**	**40**	**56,309,002**	**49**	**100**	**100**

Sales by Area of Dominant Influence (ADI)

This 13th installment of the ADI Report provides sales, unit counts, market share, RAI and RGI indexes for 214 Areas of Dominant Influences (ADIs) for a TV signal. Each area includes major cities and nearby counties.

	12/31/84			1984								
					Eating Place		Fast Food		Restaurant			
ADI Name	Population (Thous.)	% Of U.S.	Average Household Size	Eating & Drinking Place Sales ($000)	Sales ($000)	Units	Sales ($000)	Market Share (%)	Sales ($000)	Market Share (%)	RAI	RGI
Abilene - Sweetwater	316.2	0.1326	2.74	160,993	152,147	348	74,315	49	60,776	40	92	69
Albany, Ga.	389.7	0.1633	2.98	121,681	117,529	291	67,439	57	40,371	34	72	106
Albany - Schenectady - Troy	1,315.7	0.5522	2.72	585,353	531,598	1,504	174,189	33	305,190	57	75	84
Albuquerque	1,181.3	0.4957	2.86	559,927	519,292	1,303	223,490	43	244,003	47	90	86
Alexandria, La.	309.9	0.1300	2.94	106,233	98,594	239	40,799	41	38,213	39	83	91
Alexandria, Minn.	166.3	0.0697	2.81	52,006	47,853	184	16,523	35	28,651	60	66	58
Alpena	41.9	0.0175	2.70	11,189	8,462	37	3,379	40	4,666	55	52	73
Amarillo	479.0	0.2010	2.76	247,087	232,742	568	112,676	48	94,002	40	92	73
Anniston	124.9	0.0524	2.88	31,992	31,285	82	18,255	58	9,554	31	76	107
Ardmore - Ada	199.7	0.0839	2.67	69,290	67,769	180	35,415	52	24,670	36	82	73
Atlanta	3,189.1	1.3387	2.77	1,826,780	1,738,541	3,224	863,522	50	664,552	38	119	113
Augusta	597.5	0.2507	2.92	171,608	164,937	440	92,190	56	50,620	31	70	103

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ADI Report

ADI Name	12/31/84			1984								
					Eating Place		Fast Food		Restaurant			
	Population (Thous.)	% Of U.S.	Average Household Size	Eating & Drinking Place Sales ($000)	Sales ($000)	Units	Sales ($000)	Market Share (%)	Sales ($000)	Market Share (%)	RAI	RGI
Austin, Tex.	802.0	0.3367	2.68	567,025	516,881	987	235,635	46	221,872	43	127	88
Bakersfield	460.5	0.1932	2.84	259,163	244,599	502	107,135	44	122,854	50	99	86
Baltimore	2,429.2	1.0196	2.78	1,320,713	1,176,051	2,184	500,140	43	494,990	42	103	108
Bangor	347.0	0.1457	2.80	136,557	134,046	366	52,442	39	71,315	53	75	78
Baton Rouge	763.3	0.3206	3.00	368,314	340,826	572	178,916	52	106,006	31	90	123
Beaumont - Port Arthur	476.2	0.2001	2.83	219,800	200,552	389	91,361	46	82,783	41	86	104
Bend	67.8	0.0284	2.70	34,402	32,274	110	12,752	40	17,615	55	96	64
Billings - Hardin	224.7	0.0946	2.61	133,906	107,065	282	39,850	37	61,555	57	82	85
Biloxi - Gulfport - Pascagoula	176.9	0.0743	2.84	104,760	99,002	190	54,276	55	34,859	35	128	98
Binghamton	433.6	0.1820	2.78	158,189	139,631	401	51,924	37	76,696	55	66	92
Birmingham	1,371.4	0.5755	2.71	406,046	392,947	1,008	220,678	56	124,682	32	66	101
Bluefield - Beckley - Oak Hill	390.4	0.1636	2.79	98,309	96,442	266	54,439	56	33,619	35	53	105
Boise	430.2	0.1803	2.81	201,603	182,463	513	72,644	40	97,003	53	87	78
Boston	5,469.5	2.2956	2.71	4,156,595	3,892,024	6,209	1,078,102	28	2,276,870	59	135	106
Bowling Green	104.8	0.0439	2.82	50,986	48,340	112	30,522	63	14,812	31	94	89
Bristol - Kingsport - Johnson City	787.3	0.3302	2.83	223,096	218,621	550	127,763	58	66,061	30	64	81
Buffalo	1,714.0	0.7194	2.76	772,064	676,858	1,926	247,588	37	337,907	50	80	76
Burlington - Plattsburgh	623.5	0.2615	2.83	300,962	273,694	729	82,985	30	162,632	59	85	92
Butte	124.6	0.0522	2.67	69,548	52,696	192	18,900	36	31,372	60	86	73
Casper - Riverton	156.7	0.0657	2.78	86,657	74,143	194	30,403	41	38,471	52	77	107
Cedar Rapids - Waterloo - Dubuque	893.7	0.3752	2.71	349,195	298,897	994	130,012	43	144,970	49	79	76
Charleston, S.C.	604.3	0.2537	2.99	274,806	264,467	458	131,108	50	91,513	35	97	117
Charleston - Huntington	1,481.7	0.6218	2.80	427,026	407,107	1,079	235,607	58	136,813	34	65	96
Charlotte	1,800.3	0.7553	2.76	766,274	749,774	1,674	413,494	55	273,598	36	79	104
Charlottesville	100.9	0.0423	2.83	58,350	56,864	120	26,433	46	23,995	42	87	107
Chattanooga	825.0	0.3462	2.78	286,804	281,484	717	150,059	53	110,719	39	64	103
Cheyenne	79.8	0.0335	2.61	46,401	42,199	94	16,876	40	21,630	51	121	112
Chicago	8,493.3	3.5647	2.80	4,266,195	3,956,538	8,501	1,512,409	38	2,026,754	51	115	107
Chico - Redding	388.2	0.1628	2.58	179,792	167,306	478	61,924	37	94,108	56	76	62
Cincinnati	1,913.5	0.8033	2.74	953,049	868,301	1,833	374,570	43	405,545	47	97	97
Clarksburg Weston	244.9	0.1028	2.72	67,687	64,934	208	37,404	58	22,821	35	64	78
Cleveland	3,801.0	1.5954	2.70	1,829,785	1,670,560	3,773	690,883	41	832,769	50	90	94
Colorado Springs - Pueblo	582.0	0.2443	2.70	297,110	269,321	664	108,179	40	130,540	48	96	86
Columbia, S.C.	774.8	0.3252	2.90	292,964	286,448	658	148,392	52	103,730	36	101	105
Columbia - Jefferson City	432.2	0.1814	2.82	164,983	156,001	437	74,408	48	67,860	43	78	88
Columbus, Ga.	537.6	0.2257	2.90	160,235	153,726	390	88,579	58	51,378	33	78	99
Columbus - Tupelo	443.4	0.1861	2.88	78,183	75,290	286	43,122	57	24,090	32	40	103
Columbus, Ohio	1,734.5	0.7280	2.68	845,213	785,610	1,838	384,603	49	328,634	42	100	92
Corpus Christi	526.3	0.2209	3.10	295,139	266,976	560	132,045	49	107,722	40	89	83
Dallas - Ft. Worth	4,111.5	1.7256	2.72	2,745,685	2,573,930	4,245	1,137,209	44	1,062,542	41	120	112
Davenport - Rock Island - Moline	878.0	0.3685	2.67	372,002	321,636	1,022	153,267	48	139,769	43	87	63
Dayton	1,364.8	0.5728	2.69	600,661	556,978	1,419	280,059	50	221,697	40	91	86
Denver	2,578.8	1.0823	2.57	1,799,773	1,661,064	3,138	533,028	32	940,810	57	109	100
Des Moines	970.5	0.4072	2.58	414,612	370,883	1,137	162,445	44	172,867	47	73	80
Detroit	4,629.8	1.9431	2.77	2,248,116	2,058,874	4,281	804,859	39	1,032,540	50	103	103
Dothan	269.3	0.1129	2.80	69,780	68,418	197	42,345	62	21,213	31	60	93
Duluth - Superior	468.1	0.1966	2.67	203,393	169,209	569	56,975	34	103,462	61	77	67
El Centro - Yuma	191.6	0.0804	3.09	83,033	74,834	217	28,725	38	42,387	57	66	68
El Paso	672.5	0.2821	3.30	304,500	267,951	567	124,486	46	105,381	39	108	99
Elmira	240.2	0.1008	2.80	86,479	76,949	222	26,318	34	40,552	53	82	88
Erie	423.9	0.1779	2.77	177,729	156,463	376	68,800	44	71,766	46	84	94

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	12/31/84			1984								
					Eating Place		Fast Food		Restaurant			
ADI Name	Population (Thous.)	% Of U.S.	Average Household Size	Eating & Drinking Place Sales ($000)	Sales ($000)	Units	Sales ($000)	Market Share (%)	Sales ($000)	Market Share (%)	RAI	RGI
Eugene	427.4	0.1794	2.64	209,377	192,895	574	85,181	44	95,656	50	101	70
Eureka	149.4	0.0627	2.54	81,779	75,656	248	28,759	38	44,460	59	76	60
Evansville	718.1	0.3014	2.72	299,087	275,364	708	149,513	54	103,290	38	74	89
Fargo	596.7	0.2505	2.81	237,121	199,428	633	76,775	38	111,430	56	88	76
Flagstaff	87.4	0.0367	3.18	69,743	64,993	131	25,260	39	35,356	54	143	106
Flint - Saginaw - Bay City	1,267.8	0.5321	2.84	543,915	479,507	1,087	204,582	43	233,363	49	91	94
Florence, S.C.	403.8	0.1695	2.89	226,988	213,637	454	101,284	47	88,088	41	107	125
Ft. Myers - Naples	466.6	0.1958	2.41	274,113	259,236	501	97,751	38	145,365	56	89	81
Ft. Smith	374.2	0.1571	2.75	147,428	144,101	386	82,593	57	48,470	34	105	74
Ft. Wayne	663.9	0.2786	2.82	294,860	271,864	677	108,781	40	141,245	52	96	86
Fresno - Visalia	1,174.9	0.4931	2.92	480,893	444,314	1,200	202,228	46	225,525	51	83	75
Gainesville	208.2	0.0873	2.69	115,774	109,374	239	41,422	38	56,973	52	99	88
Glendive	14.2	0.0059	2.63	7,687	6,601	20	2,357	36	3,913	59	77	90
Grand Junction	181.9	0.0765	2.69	98,969	92,007	241	27,268	30	58,385	63	81	80
Grand Rapids - Kalamazoo - Battle Creek	1,630.4	0.6842	2.81	674,660	613,071	1,482	236,449	39	315,126	51	101	95
Great Falls	181.0	0.0759	2.63	87,704	67,379	246	24,789	37	39,467	59	79	68
Green Bay	993.1	0.4170	2.75	423,761	356,585	1,093	125,462	35	206,952	58	95	78
Greensboro - Winston-Salem - High Point	1,327.2	0.5571	2.70	616,884	605,539	1,280	305,700	50	219,636	36	98	99
Greenville - New Bern - Washington	649.7	0.2730	2.93	226,649	215,283	521	121,529	56	79,325	37	79	87
Greenville - Spartanburg - Asheville	1,635.6	0.6866	2.72	611,744	598,529	1,554	331,486	55	212,273	35	79	90
Greenwood - Greenville	264.3	0.1107	3.14	53,803	53,530	186	30,204	56	17,016	32	48	86
Hagerstown	116.6	0.0490	2.80	38,229	31,341	99	13,456	43	13,636	44	64	103
Harrisburg - York - Lancaster - Lebanon	1,423.9	0.5977	2.70	646,269	586,647	1,394	226,702	39	307,144	52	82	107
Harrisonburg	99.0	0.0416	2.97	37,870	35,966	104	18,468	51	12,414	35	80	85
Hartford - New Haven	2,241.8	0.9408	2.74	1,330,652	1,217,879	2,646	412,575	34	652,314	54	104	90
Helena	46.9	0.0196	2.54	30,020	22,735	66	8,114	36	13,468	59	79	96
Houston	3,927.7	1.6486	2.81	2,600,381	2,410,068	3,825	999,607	41	1,056,281	44	111	120
Huntsville - Decatur - Florence	704.2	0.2953	2.71	227,198	220,378	547	127,411	58	72,615	33	78	104
Idaho Falls - Pocatello	310.5	0.1307	3.15	105,488	96,813	302	39,079	40	52,266	54	68	83
Indianapolis	2,291.7	0.9616	2.76	1,189,485	1,108,775	2,401	540,926	49	435,991	39	108	93
Jackson, Miss.	806.9	0.3384	2.90	233,121	227,165	585	121,883	54	78,398	35	66	111
Jackson, Tenn.	122.0	0.0511	2.71	48,506	46,562	131	23,688	51	19,312	41	89	80
Jacksonville	1,109.7	0.4657	2.76	541,136	509,774	1,086	253,703	50	210,477	41	103	110
Johnstown - Altoona	806.6	0.3388	2.77	256,442	228,185	653	95,178	42	108,475	48	69	87
Jonesboro	183.8	0.0772	2.72	62,755	62,210	179	38,106	61	18,950	30	94	70
Joplin - Pittsburg	460.9	0.1934	2.63	153,013	147,290	514	74,107	50	59,110	40	72	64
Kansas City	1,855.8	0.7791	2.68	934,719	892,390	1,929	417,533	47	393,794	44	97	103
Knoxville	1,139.3	0.4780	2.73	534,975	518,836	1,015	255,761	49	214,888	41	88	104
La Crosse - Eau Claire	454.0	0.1904	2.78	206,266	166,374	463	56,608	34	99,854	60	89	81
Lafayette, Ind.	132.3	0.0556	2.88	71,883	66,026	134	32,068	49	27,396	41	124	102
Lafayette, La.	571.7	0.2399	2.94	281,332	261,347	474	112,842	43	83,180	32	94	100
Lake Charles	220.0	0.0925	2.89	85,398	78,904	157	34,951	44	28,010	35	65	117
Lansing	616.3	0.2587	2.87	271,270	246,816	548	110,778	45	116,145	47	101	102
Laredo	125.2	0.0525	3.79	58,954	57,451	106	26,157	46	23,352	41	70	86
Las Vegas	557.8	0.2340	2.52	402,011	350,882	553	126,224	36	175,828	50	100	631
Laurel - Hattiesburg	251.6	0.1058	2.87	73,238	70,651	184	39,933	57	22,501	32	60	95
Lexington	886.6	0.3720	2.82	347,504	335,266	781	190,526	57	117,350	35	84	101
Lima	113.9	0.0478	2.79	58,704	54,914	141	25,052	46	24,916	45	103	74
Lincoln - Hastings - Kearney	675.7	0.2836	2.62	284,542	246,910	823	105,735	43	123,666	50	91	72

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	12/31/84			1984								
					Eating Place		Fast Food		Restaurant			
ADI Name	Population (Thous.)	% Of U.S.	Average House-hold Size	Eating & Drinking Place Sales ($000)	Sales ($000)	Units	Sales ($000)	Market Share (%)	Sales ($000)	Market Share (%)	RAI	RGI
Little Rock	1,225.3	0.5140	2.77	459,532	450,910	1,140	256,727	57	149,526	33	91	88
Los Angeles	11,669.0	4.8972	2.78	7,848,470	7,451,960	12,475	2,688,223	36	4,126,130	55	123	102
Louisville	1,409.6	0.5920	2.81	630,609	589,752	1,208	326,927	55	206,798	35	92	107
Lubbock	432.1	0.1814	2.92	202,360	189,961	475	90,123	47	73,577	39	96	72
Macon	458.3	0.1923	2.93	169,167	163,500	375	90,654	55	57,716	35	81	110
Madison	523.6	0.2196	2.58	317,138	267,554	677	94,982	36	161,358	60	115	83
Mankato	64.9	0.0272	2.77	31,463	27,014	84	9,440	35	15,601	58	75	70
Marquette	158.7	0.0668	2.86	47,616	38,264	151	15,068	39	21,107	55	58	73
McAllen - Brownsville	635.3	0.2666	3.67	241,022	224,667	503	99,078	44	84,090	37	81	87
Medford	312.1	0.1311	2.66	146,348	133,167	390	51,466	39	73,408	55	93	64
Memphis	1,668.0	0.7001	2.87	552,288	533,742	1,378	285,844	54	186,103	35	69	101
Meridian	211.8	0.0889	2.85	51,584	50,511	146	29,541	58	15,823	31	56	100
Miami	2,967.0	1.2453	2.56	2,018,018	1,881,195	3,195	611,581	33	1,041,406	55	128	123
Milwaukee	1,882.4	0.7903	2.69	943,274	808,079	1,992	289,451	36	458,090	57	97	96
Minneapolis - St. Paul	3,182.1	1.3354	2.73	1,638,082	1,460,655	3,096	498,223	34	841,163	58	97	110
Minot - Bismarck - Dickinson	403.2	0.1690	2.88	178,462	141,014	406	55,046	39	77,984	55	80	91
Missoula	187.5	0.0788	2.60	92,232	72,963	258	26,097	36	43,308	59	76	68
Mobile - Pensacola	1,193.3	0.5008	2.83	492,962	459,163	983	232,752	51	171,685	37	80	106
Monroe - El Dorado	535.1	0.2242	2.86	155,457	146,619	364	67,302	46	45,947	31	71	94
Montgomery	496.9	0.2088	2.82	142,413	137,131	342	82,222	60	41,251	30	70	111
Nashville	1,836.5	0.7714	2.77	699,996	679,935	1,670	310,512	46	306,217	45	81	102
New Orleans	1,782.0	0.7480	2.81	1,204,096	1,121,934	1,650	447,623	40	453,782	40	119	124
New York	18,243.9	7.6566	2.70	10,032,533	9,181,919	18,009	2,487,716	27	5,146,897	56	105	107
Norfolk - Portsmouth - Newport News - Hampton	1,514.6	0.6359	2.97	692,895	675,643	1,549	320,022	47	297,295	44	109	102
North Platte	43.5	0.0184	2.69	17,361	14,895	46	6,178	41	7,540	51	93	94
Odessa - Midland	389.6	0.1633	2.86	281,588	255,838	463	121,240	47	102,977	40	97	80
Oklahoma City	1,587.3	0.6663	2.63	1,063,631	1,029,940	1,955	501,375	49	389,707	38	118	82
Omaha	929.9	0.3899	2.66	430,882	374,159	1,013	161,534	43	186,857	50	87	85
Orlando - Daytona Beach - Melbourne	1,800.2	0.7555	2.58	1,092,140	1,033,112	1,835	403,848	39	525,758	51	112	127
Ottumwa - Kirksville	78.6	0.0331	2.69	25,462	22,687	82	10,602	47	10,402	46	65	59
Paducah - Cape Girardeau - Harrisburg - Marion	861.6	0.3616	2.64	286,108	268,345	878	144,157	54	105,718	39	71	72
Palm Springs	784.7	0.3293	2.72	431,048	412,192	763	172,161	42	226,554	55	95	94
Panama City	194.9	0.0817	2.68	110,686	104,032	202	40,016	38	54,045	52	131	106
Parkersburg	92.9	0.0390	2.65	42,738	39,902	88	22,168	56	14,244	36	92	93
Peoria	586.4	0.2460	2.71	247,564	221,553	607	96,268	43	109,955	50	94	90
Philadelphia	7,258.6	3.0465	2.73	3,682,244	3,270,532	6,690	1,183,350	36	1,651,430	50	94	117
Phoenix	2,150.3	0.9024	2.63	1,161,357	1,072,704	2,153	390,785	36	565,523	53	87	106
Pittsburgh	3,322.5	1.3940	2.65	1,421,223	1,256,974	2,926	474,591	38	626,996	50	84	95
Portland, Ore	2,101.9	0.8821	2.62	1,253,499	1,137,357	2,519	419,719	37	629,411	55	124	84
Portland - Poland Spring	871.2	0.3656	2.71	465,959	451,523	1,110	160,353	36	257,544	57	87	84
Presque Isle	87.9	0.0369	2.99	23,504	22,733	70	8,889	39	12,093	53	56	92
Providence - New Bedford	1,558.7	0.6540	2.76	833,556	760,620	1,731	260,703	34	424,476	56	91	83
Quincy - Hannibal	331.9	0.1390	2.66	105,598	91,818	361	45,695	50	39,906	43	65	61
Raleigh - Durham	1,697.7	0.7123	2.83	731,042	713,149	1,571	379,073	53	267,097	37	91	100
Rapid City	265.7	0.1114	2.80	125,706	105,843	303	38,816	37	59,907	57	82	95
Reno	360.9	0.1516	2.48	233,767	211,167	443	75,366	36	119,540	57	84	388
Richmond	1,158.0	0.4861	2.86	448,725	441,440	1,152	222,474	50	173,069	39	79	100
Roanoke - Lynchburg	977.6	0.4104	2.88	339,890	333,321	881	161,935	49	131,883	40	77	105
Rochester, N.Y.	957.7	0.4019	2.75	493,858	451,838	963	149,101	33	246,755	55	96	102
Rochester - Mason City - Austin	386.2	0.1622	2.62	150,304	132,362	454	49,275	37	74,057	56	68	80
Rockford	518.3	0.2176	2.70	226,597	196,967	557	81,249	41	101,304	51	89	81

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	12/31/84			1984								
					Eating Place		Fast Food		Restaurant			
ADI Name	Population (Thous.)	% Of U.S.	Average Household Size	Eating & Drinking Place Sales ($000)	Sales ($000)	Units	Sales ($000)	Market Share (%)	Sales ($000)	Market Share (%)	RAI	RGI
Roswell	173.4	0.0727	2.80	86,657	79,191	195	36,356	46	36,688	46	67	82
Sacramento - Stockton	2,520.5	1.0577	2.65	1,407,405	1,302,815	2,922	572,753	44	659,890	51	100	78
St. Joseph	136.0	0.0571	2.68	55,994	51,504	139	24,017	47	22,205	43	66	77
St. Louis	2,890.8	1.2129	2.77	1,398,588	1,285,997	2,820	614,196	48	511,441	40	88	97
Salinas - Monterey	570.9	0.2397	2.86	345,671	324,305	728	116,875	36	195,897	60	124	82
Salisbury	228.9	0.0960	2.73	188,888	177,518	305	73,566	41	93,612	53	138	88
Salt Lake City	1,841.7	0.7730	3.18	664,460	625,650	1,652	281,084	45	301,280	48	76	108
San Angelo	121.0	0.0508	2.80	75,411	71,114	130	32,837	46	28,784	40	104	76
San Antonio	1,566.8	0.6576	3.03	869,525	802,369	1,574	361,265	45	309,557	39	104	93
San Diego	2,085.3	0.8752	2.72	1,326,482	1,241,678	2,235	448,976	36	692,261	56	130	103
San Francisco	5,341.5	2.2418	2.58	4,260,808	3,964,798	6,841	1,318,760	33	2,249,111	57	131	101
Santa Barbara - Santa Maria San Luis Obispo	505.6	0.2123	2.66	411,390	389,735	715	126,459	32	245,991	63	130	80
Sarasota	241.6	0.1014	2.22	173,166	166,030	276	43,186	26	110,138	66	117	90
Savannah	594.9	0.2497	2.97	270,677	256,510	524	135,561	53	95,857	37	98	113
Seattle - Tacoma	3,063.7	1.2859	2.56	2,075,211	1,907,063	3,499	636,611	33	1,089,026	57	118	91
Selma	54.0	0.0226	2.93	13,053	12,988	41	8,301	64	3,732	29	64	82
Shreveport - Texarkana	1,231.8	0.5169	2.78	476,363	454,198	1,025	224,583	49	173,389	38	82	92
Sioux City	425.8	0.1788	2.66	146,144	123,060	509	53,160	43	60,748	49	67	63
Sioux Falls - Mitchell	610.6	0.2562	2.70	234,928	196,986	704	69,248	35	115,730	59	78	71
South Bend - Elkhart	786.1	0.3300	2.78	353,675	325,236	877	144,384	44	153,423	47	95	76
Spokane	855.5	0.3587	2.68	395,286	355,749	939	139,585	39	196,620	55	83	78
Springfield, Mass	583.1	0.2447	2.76	352,852	319,445	595	97,490	31	189,500	59	103	91
Springfield, Mo	777.3	0.3260	2.70	268,614	252,644	824	126,429	50	99,733	39	73	65
Springfield - Decatur - Champaign	937.1	0.3932	2.64	418,665	369,810	1,016	166,311	45	171,984	47	95	84
Syracuse	959.0	0.4025	2.84	419,339	370,138	1,007	128,625	35	200,969	54	80	89
Tallahassee - Thomasville	451.1	0.1895	2.85	187,192	179,476	408	81,514	45	82,183	46	92	103
Tampa - St. Petersburg	2,541.0	1.0665	2.45	1,390,070	1,305,229	2,353	518,304	40	644,359	49	95	104
Terre Haute	426.0	0.1786	2.66	155,142	140,523	429	70,914	50	57,400	41	73	71
Toledo	1,061.6	0.4454	2.75	549,072	501,745	1,154	204,854	41	246,438	49	97	83
Topeka	394.9	0.1658	2.72	186,288	170,329	463	88,341	52	68,255	40	90	80
Traverse City - Cadillac	417.3	0.1750	2.72	192,629	166,978	589	66,368	40	91,594	55	82	64
Tucson	729.6	0.3063	2.60	350,840	317,195	759	129,677	41	155,506	49	90	91
Tulsa	1,202.6	0.5045	2.65	603,378	586,788	1,270	301,206	51	208,526	36	104	86
Tuscaloosa	143.2	0.0601	2.78	52,801	49,494	112	28,881	58	15,115	31	68	98
Twin Falls	88.7	0.0373	2.89	32,970	30,311	88	12,209	40	16,403	54	73	73
Tyler	339.6	0.1423	2.85	135,964	134,901	289	66,527	49	53,673	40	89	84
Utica	384.2	0.1612	2.83	147,892	134,972	398	46,862	35	70,559	52	75	76
Victoria	77.6	0.0325	2.97	46,137	40,142	91	18,147	45	16,323	41	88	73
Waco - Temple	649.9	0.2728	2.90	334,064	315,258	636	145,022	46	127,651	40	106	80
Washington, D.C.	4,134.3	1.7348	2.73	2,563,554	2,469,338	4,084	923,433	37	1,149,045	47	116	132
Watertown - Carthage	235.8	0.0990	2.99	84,411	70,745	233	26,878	38	36,819	52	75	76
Wausau - Rhinelander	444.1	0.1863	2.77	166,018	139,512	488	43,703	31	88,528	63	76	71
West Palm Beach	1,009.7	0.4238	2.42	636,416	596,690	1,001	177,968	30	372,301	62	101	106
Wheeling - Steubenville	450.5	0.1889	2.70	142,701	129,468	409	65,315	50	52,572	41	67	78
Wichita - Hutchinson	1,099.3	0.4612	2.62	474,455	456,037	1,470	228,176	50	184,155	40	81	72
Wichita Falls - Lawton	452.0	0.1896	2.81	215,441	206,477	460	102,100	49	79,216	38	99	78
Wilkes-Barre - Scranton	1,145.1	0.4805	2.68	422,686	383,719	1,089	152,526	40	177,186	46	75	80
Wilmington	370.5	0.1554	2.87	140,895	137,483	334	75,626	55	50,736	37	81	90
Yakima	476.6	0.1999	2.73	226,807	201,810	521	72,426	36	115,934	57	85	83
Youngstown	647.2	0.2716	2.73	267,692	238,905	641	111,624	47	104,879	44	86	78
Zanesville	84.5	0.0355	2.71	35,556	32,267	90	15,520	48	13,021	40	87	75
Total ADIs	236,697.1	99.3379	2.74	122,396,465	113,302,922	239,818	45,128,294	40	55,533,415	49	99	99

Top 100 Eating Place Markets

1984

By Metro Area

Metro Area Name	Sales($000)	Ranking
Los Angeles - Long Beach	5,014,814	1
New York	4,645,074	2
Chicago	3,000,754	3
Boston - Lawrence - Salem - Lowell - Brockton	2,806,094	4
Washington	2,218,903	5
Houston	2,105,879	6
Philadelphia	2,096,760	7
Detroit	1,920,100	8
San Francisco	1,686,707	9
Anaheim - Santa Ana	1,665,364	10
Dallas	1,623,373	11
Atlanta	1,481,415	12
Nassau - Suffolk	1,302,330	13
Seattle	1,255,926	14
San Diego	1,241,678	15
St Louis	1,176,296	16
Minneapolis - St Paul	1,153,729	17
Baltimore	1,114,056	18
Denver	1,084,144	19
Oakland	1,054,156	20
Tampa - St Petersburg - Clearwater	1,010,821	21
Miami - Hialeah	995,497	22
Pittsburgh	958,610	23
San Jose	948,274	24
Phoenix	946,317	25
Riverside - San Bernardino	912,130	26
Cleveland	897,161	27
New Orleans	885,805	28
Fort Lauderdale - Hollywood - Pompano Beach	821,286	29
Honolulu	812,743	30
Kansas City	784,188	31
Newark	777,479	32
Oklahoma City	766,190	33
Sacramento	730,039	34
Cincinnati	729,443	35
Bergen - Passaic	719,985	36
Fort Worth - Arlington	712,894	37
San Antonio	700,662	38
Portland, Ore	699,383	39
Indianapolis	673,579	40
Columbus, Ohio	663,392	41
Milwaukee	628,858	42
Hartford - New Britain - Middletown - Bristol	619,233	43
Norfolk - Virginia Beach - Newport News	588,388	44
Orlando	569,392	45
Bridgeport - Stamford - Norwalk - Danbury	501,093	46
Charlotte - Gastonia - Rock Hill	487,559	47
Louisville	485,308	48
West Palm Beach - Boca Raton - Delray Beach	467,208	49
Greensboro - Winston-Salem - High Point	462,374	50
Rochester, N Y	461,488	51
Nashville	461,017	52
Austin	452,581	53
Buffalo	443,155	54
Tulsa	439,588	55
Monmouth - Ocean	428,547	56
Dayton - Springfield	425,824	57
New Haven - Waterbury - Meriden	410,038	58
Jacksonville, Fla	404,444	59
Providence - Pawtucket - Woonsocket	399,833	60
Memphis	399,282	61
Middlesex - Somerset - Hunterdon	393,708	62
Knoxville	384,727	63
Salt Lake City - Ogden	368,349	64
Richmond - Petersburg	358,819	65
Toledo	347,003	66
Las Vegas	346,816	67
Albany - Schenectady - Troy	339,024	68
Raleigh - Durham	336,541	69
Worcester - Fitchburg - Leominster	330,337	70
Springfield, Mass	319,445	71
Gary - Hammond	313,093	72
Akron	307,994	73
Birmingham	303,382	74
Omaha	294,038	75
Scranton - Wilkes-Barre	287,367	76
Tucson	279,347	77
Grand Rapids	273,248	78
Allentown - Bethlehem	271,418	79
Anchorage	268,467	80
Syracuse	268,151	81
Baton Rouge	267,303	82
Albuquerque	265,671	83
Harrisburg - Lebanon - Carlisle	258,831	84
Santa Barbara - Santa Maria - Lompoc	257,532	85
Atlantic City	256,606	86
Oxnard - Ventura	253,395	87
Greenville - Spartanburg	251,817	88
Tacoma	251,097	89
Bakersfield	244,599	90
Little Rock - North Little Rock	240,988	91
New Bedford - Fall River - Attleboro	233,439	92
Fresno	232,953	93
Wilmington, Del	228,952	94
Charleston, S C	222,313	95
El Paso	219,251	96
Wichita	210,151	97
Columbia, S C	207,289	98
Corpus Christi	198,159	99
Madison	196,791	100

By ADI

ADI Name	Sales($000)	Ranking
New York	9,181,919	1
Los Angeles	7,451,960	2
San Francisco	3,964,798	3
Chicago	3,956,536	4
Boston	3,892,024	5
Philadelphia	3,270,532	6
Dallas - Ft Worth	2,573,930	7
Washington, D C	2,469,338	8
Houston	2,410,068	9
Detroit	2,058,874	10
Seattle - Tacoma	1,907,063	11
Miami	1,881,195	12
Atlanta	1,738,541	13
Cleveland	1,670,560	14
Denver	1,661,064	15
Minneapolis - St Paul	1,460,655	16
Tampa - St Petersburg	1,305,229	17
Sacramento - Stockton	1,302,815	18
St Louis	1,285,997	19
Pittsburgh	1,256,974	20
San Diego	1,241,678	21
Hartford - New Haven	1,217,879	22
Baltimore	1,176,051	23
Portland, Ore	1,137,357	24
New Orleans	1,121,934	25
Indianapolis	1,108,775	26
Phoenix	1,072,704	27
Orlando - Daytona Beach - Melbourne	1,033,112	28
Oklahoma City	1,029,940	29
Kansas City	892,390	30
Cincinnati	868,301	31
Milwaukee	808,079	32
San Antonio	802,369	33
Columbus, Ohio	785,610	34
Providence - New Bedford	760,620	35
Charlotte	749,774	36
Raleigh - Durham	713,149	37
Nashville	679,935	38
Buffalo	676,858	39
Norfolk - Portsmouth - Newport News - Hampton	675,643	40
Salt Lake City	625,650	41
Grand Rapids - Kalamazoo - Battle Creek	613,071	42
Greensboro - Winston-Salem - High Point	605,539	43
Greenville - Spartanburg - Asheville	598,529	44
West Palm Beach	596,690	45
Louisville	589,752	46
Tulsa	586,788	47
Harrisburg - York - Lancaster - Lebanon	586,647	48
Dayton	556,978	49
Memphis	533,742	50
Albany - Schenectady - Troy	531,598	51
Albuquerque	519,292	52
Knoxville	518,836	53
Austin, Tex	516,881	54
Jacksonville	509,774	55
Toledo	501,745	56
Flint - Saginaw - Bay City	479,507	57
Mobile - Pensacola	459,163	58
Wichita - Hutchinson	456,037	59
Shreveport - Texarkana	454,198	60
Rochester, N Y	451,838	61
Portland - Poland Spring	451,523	62
Little Rock	450,910	63
Fresno - Visalia	444,314	64
Richmond	441,440	65
Palm Springs	412,192	66
Charleston - Huntington	407,107	67
Birmingham	392,947	68
Santa Barbara - Santa Maria - San Luis Obispo	389,735	69
Wilkes-Barre - Scranton	383,719	70
Omaha	374,159	71
Des Moines	370,883	72
Syracuse	370,138	73
Springfield - Decatur - Champaign	369,810	74
Green Bay	356,585	75
Spokane	355,749	76
Las Vegas	350,882	77
Baton Rouge	340,826	78
Lexington	335,266	79
Roanoke - Lynchburg	333,321	80
South Bend - Elkhart	325,236	81
Salinas - Monterey	324,305	82
Davenport - Rock Island - Moline	321,636	83
Springfield, Mass	319,445	84
Tucson	317,195	85
Waco - Temple	315,258	86
Cedar Rapids - Waterloo - Dubuque	298,897	87
Columbia, S C	286,448	88
Chattanooga	281,484	89
Evansville	275,364	90
Burlington - Plattsburgh	273,694	91
Ft Wayne	271,864	92
Colorado Springs - Pueblo	269,321	93
Paducah - Cape Girardeau - Harrisburg - Marion	268,345	94
El Paso	267,951	95
Madison	267,554	96
Corpus Christi	266,976	97
Charleston, S C	264,467	98
Lafayette, La	261,347	99
Ft Myers - Naples	259,236	100

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Top 100 Restaurant Markets

By Metro Area · 1984 · By ADI

Metro Area Name	Sales($000)	Ranking
Los Angeles - Long Beach	2,789,279	1
New York	2,671,287	2
Boston - Lawrence - Salem - Lowell - Brockton	1,591,908	3
Chicago	1,569,055	4
Washington	1,050,943	5
San Francisco	1,048,001	6
Philadelphia	1,032,899	7
Detroit	962,982	8
Anaheim - Santa Ana	949,783	9
Houston	938,911	10
Seattle	710,290	11
Dallas	694,709	12
San Diego	692,261	13
Nassau - Suffolk	689,251	14
Minneapolis - St. Paul	655,397	15
Denver	600,517	16
Atlanta	578,293	17
Oakland	559,181	18
Miami - Hialeah	515,045	19
Tampa - St. Petersburg - Clearwater	507,990	20
Pittsburgh	497,603	21
Phoenix	496,761	22
Fort Lauderdale - Hollywood - Pompano Beach	493,899	23
San Jose	489,214	24
St. Louis	464,235	25
Baltimore	462,310	26
Riverside - San Bernardino	455,986	27
Cleveland	454,048	28
Honolulu	431,597	29
Bergen - Passaic	402,262	30
Portland, Ore	396,239	31
New Orleans	394,136	32
Newark	390,858	33
Sacramento	371,411	34
Milwaukee	348,632	35
Kansas City	348,317	36
Cincinnati	346,359	37
Hartford - New Britain - Middletown - Bristol	316,203	38
West Palm Beach - Boca Raton - Delray Beach	307,025	39
Bridgeport - Stamford - Norwalk - Danbury	297,439	40
Orlando	294,984	41
Oklahoma City	293,927	42
Columbus, Ohio	279,077	43
Fort Worth - Arlington	275,344	44
San Antonio	270,068	45
Norfolk - Virginia Beach - Newport News	265,395	46
Indianapolis	263,387	47
Monmouth - Ocean	253,668	48
Rochester, N.Y.	251,964	49
Providence - Pawtucket - Woonsocket	229,334	50
New Haven - Waterbury - Meriden	226,204	51
Buffalo	221,524	52
Middlesex - Somerset - Hunterdon	221,243	53
Nashville	220,412	54
Austin	196,987	55
Worcester - Fitchburg - Leominster	194,127	56
Albany - Schenectady - Troy	192,586	57
Springfield, Mass	189,500	58
Charlotte - Gastonia - Rock Hill	175,607	59
Toledo	175,346	60
Las Vegas	173,642	61
Louisville	171,665	62
Dayton - Springfield	169,455	63
Jacksonville, Fla	167,643	64
Santa Barbara - Santa Maria - Lompoc	167,451	65
Greensboro - Winston-Salem - High Point	166,998	66
Akron	166,178	67
Salt Lake City - Ogden	165,821	68
Knoxville	164,074	69
Tulsa	154,387	70
Atlantic City	149,743	71
Syracuse	147,810	72
Oxnard - Ventura	146,678	73
Omaha	146,201	74
Grand Rapids	146,186	75
Richmond - Petersburg	143,781	76
Tacoma	142,117	77
Memphis	139,398	78
Scranton - Wilkes-Barre	137,311	79
Gary - Hammond	135,530	80
Tucson	135,006	81
Allentown - Bethlehem	132,004	82
Raleigh - Durham	128,565	83
Harrisburg - Lebanon - Carlisle	126,682	84
Salinas - Seaside - Monterey	124,026	85
Bakersfield	122,854	86
Albuquerque	122,575	87
New Bedford - Fall River - Attleboro	117,328	88
Fresno	116,082	89
Madison	115,380	90
Anchorage	112,484	91
Wilmington, Del	111,099	92
Sarasota	110,138	93
Portsmouth - Dover - Rochester	108,477	94
Lancaster	104,218	95
Vallejo - Fairfield - Napa	103,802	96
Spokane	103,679	97
Manchester - Nashua	103,474	98
Fort Wayne	101,204	99
Lake County, Ill	99,331	100

ADI Name	Sales($000)	Ranking
New York	5,146,897	1
Los Angeles	4,126,130	2
Boston	2,276,870	3
San Francisco	2,249,111	4
Chicago	2,026,754	5
Philadelphia	1,651,430	6
Washington, D.C.	1,149,045	7
Seattle - Tacoma	1,089,026	8
Dallas - Ft. Worth	1,062,542	9
Houston	1,056,281	10
Miami	1,041,406	11
Detroit	1,032,540	12
Denver	940,810	13
Minneapolis - St. Paul	841,163	14
Cleveland	832,769	15
San Diego	692,261	16
Atlanta	664,552	17
Sacramento - Stockton	659,890	18
Hartford - New Haven	652,314	19
Tampa - St. Petersburg	644,359	20
Portland, Ore	629,411	21
Pittsburgh	626,996	22
Phoenix	565,523	23
Orlando - Daytona Beach - Melbourne	525,758	24
St. Louis	511,441	25
Baltimore	494,990	26
Milwaukee	458,090	27
New Orleans	453,782	28
Indianapolis	435,991	29
Providence - New Bedford	424,476	30
Cincinnati	405,545	31
Kansas City	393,794	32
Oklahoma City	389,707	33
West Palm Beach	372,301	34
Buffalo	337,907	35
Columbus, Ohio	328,634	36
Grand Rapids - Kalamazoo - Battle Creek	315,126	37
San Antonio	309,557	38
Harrisburg - York - Lancaster - Lebanon	307,144	39
Nashville	306,217	40
Albany - Schenectady - Troy	305,190	41
Salt Lake City	301,280	42
Norfolk - Portsmouth - Newport News - Hampton	297,295	43
Charlotte	273,598	44
Raleigh - Durham	267,097	45
Portland - Poland Spring	257,544	46
Rochester, N.Y.	246,755	47
Toledo	246,438	48
Santa Barbara - Santa Maria - San Luis Obispo	245,991	49
Albuquerque	244,003	50
Flint - Saginaw - Bay City	233,363	51
Palm Springs	226,554	52
Fresno - Visalia	225,525	53
Austin, Tex	221,872	54
Dayton	221,697	55
Greensboro - Winston-Salem - High Point	219,636	56
Knoxville	214,888	57
Greenville - Spartanburg - Asheville	212,273	58
Jacksonville	210,477	59
Tulsa	208,526	60
Green Bay	206,952	61
Louisville	206,798	62
Syracuse	200,969	63
Spokane	196,620	64
Salinas - Monterey	195,897	65
Springfield, Mass	189,500	66
Omaha	186,857	67
Memphis	186,103	68
Wichita - Hutchinson	184,155	69
Wilkes-Barre - Scranton	177,186	70
Las Vegas	175,828	71
Shreveport - Texarkana	173,389	72
Richmond	173,069	73
Des Moines	172,867	74
Springfield - Decatur - Champaign	171,984	75
Mobile - Pensacola	171,685	76
Burlington - Plattsburgh	162,632	77
Madison	161,358	78
Tucson	155,506	79
South Bend - Elkhart	153,423	80
Little Rock	149,526	81
Ft. Myers - Naples	145,365	82
Cedar Rapids - Waterloo - Dubuque	144,970	83
Ft. Wayne	141,245	84
Davenport - Rock Island - Moline	139,769	85
Charleston - Huntington	136,813	86
Roanoke - Lynchburg	131,883	87
Colorado Springs - Pueblo	130,540	88
Waco - Temple	127,651	89
Birmingham	124,682	90
Lincoln - Hastings - Kearney	123,666	91
Bakersfield	122,854	92
Reno	119,540	93
Lexington	117,350	94
Lansing	116,145	95
Yakima	115,934	96
Sioux Falls - Mitchell	115,730	97
Fargo	111,430	98
Chattanooga	110,719	99
Sarasota	110,138	100

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Top 100 Fast Food Markets

1984

By Metro Area

Metro Area Name	Sales($000)	Ranking
Los Angeles - Long Beach	1,742,226	1
New York	1,133,091	2
Chicago	1,097,462	3
Houston	845,781	4
Washington	801,701	5
Boston - Lawrence - Salem - Lowell - Brockton	776,403	6
Philadelphia	754,682	7
Detroit	748,869	8
Atlanta	711,947	9
Dallas	676,889	10
Anaheim - Santa Ana	601,177	11
St. Louis	558,567	12
Baltimore	473,711	13
San Diego	448,976	14
Oakland	419,512	15
Riverside - San Bernardino	416,109	16
San Francisco	409,758	17
Seattle	397,573	18
Minneapolis - St. Paul	393,765	19
Nassau - Suffolk	388,873	20
Tampa - St. Petersburg - Clearwater	384,125	21
San Jose	380,282	22
Oklahoma City	364,710	23
Kansas City	363,283	24
Cleveland	354,549	25
New Orleans	348,764	26
Denver	342,792	27
Phoenix	341,660	28
Miami - Hialeah	340,245	29
Pittsburgh	338,675	30
Fort Worth - Arlington	334,675	31
Columbus, Ohio	325,539	32
Indianapolis	322,078	33
Sacramento	313,211	34
Cincinnati	306,880	35
San Antonio	306,031	36
Honolulu	290,035	37
Norfolk - Virginia Beach - Newport News	271,224	38
Charlotte - Gastonia - Rock Hill	269,025	39
Louisville	265,106	40
Fort Lauderdale - Hollywood - Pompano Beach	244,011	41
Portland, Ore	242,103	42
Newark	234,119	43
Milwaukee	230,178	44
Greensboro - Winston-Salem - High Point	226,309	45
Tulsa	224,235	46
Orlando	221,902	47
Dayton - Springfield	214,677	48
Memphis	210,150	49
Hartford - New Britain - Middletown - Bristol	204,857	50
Austin	200,828	51
Jacksonville, Fla	198,404	52
Bergen - Passaic	194,470	53
Nashville	193,753	54
Knoxville	181,832	55
Richmond - Petersburg	179,263	56
Salt Lake City - Ogden	173,323	57
Raleigh - Durham	168,143	58
Birmingham	165,014	59
Buffalo	158,672	60
Rochester, N.Y	152,662	61
Gary - Hammond	152,495	62
Baton Rouge	148,344	63
Greenville - Spartanburg	144,533	64
New Haven - Waterbury - Meriden	143,662	65
Monmouth - Ocean	138,038	66
Toledo	135,783	67
Bridgeport - Stamford - Norwalk - Danbury	132,501	68
Providence - Pawtucket - Woonsocket	130,833	69
Little Rock - North Little Rock	128,850	70
Omaha	127,212	71
Las Vegas	124,761	72
Akron	123,225	73
West Palm Beach - Boca Raton - Delray Beach	123,020	74
Middlesex - Somerset - Hunterdon	122,857	75
Tucson	114,821	76
Albany - Schenectady - Troy	114,753	77
Columbia, S.C	111,726	78
Charleston, S.C	111,656	79
Albuquerque	110,694	80
Scranton - Wilkes-Barre	108,716	81
Fresno	107,310	82
Bakersfield	107,135	83
Harrisburg - Lebanon - Carlisle	104,075	84
El Paso	102,801	85
Lexington-Fayette	102,321	86
Wilmington, Del	102,194	87
Allentown - Bethlehem	100,101	88
Wichita	99,526	89
Grand Rapids	97,749	90
Springfield, Mass	97,490	91
Tacoma	96,518	92
Youngstown - Warren	95,045	93
Corpus Christi	94,737	94
Johnson City - Kingsport - Bristol	94,436	95
Oxnard - Ventura	93,901	96
Mobile	92,850	97
New Bedford - Fall River - Attleboro	92,726	98
Worcester - Fitchburg - Leominster	92,042	99
Chattanooga	90,379	100

By ADI

ADI Name	Sales($000)	Ranking
Los Angeles	2,688,223	1
New York	2,487,716	2
Chicago	1,512,409	3
San Francisco	1,318,760	4
Philadelphia	1,183,350	5
Dallas - Ft. Worth	1,137,209	6
Boston	1,078,102	7
Houston	999,607	8
Washington, D.C	923,433	9
Atlanta	863,522	10
Detroit	804,859	11
Cleveland	690,883	12
Seattle - Tacoma	636,611	13
St. Louis	614,196	14
Miami	611,581	15
Sacramento - Stockton	572,753	16
Indianapolis	540,926	17
Denver	533,028	18
Tampa - St. Petersburg	518,304	19
Oklahoma City	501,375	20
Baltimore	500,140	21
Minneapolis - St. Paul	498,223	22
Pittsburgh	474,591	23
San Diego	448,976	24
New Orleans	447,623	25
Portland, Ore	419,719	26
Kansas City	417,533	27
Charlotte	413,494	28
Hartford - New Haven	412,575	29
Orlando - Daytona Beach - Melbourne	403,848	30
Phoenix	390,785	31
Columbus, Ohio	384,603	32
Raleigh - Durham	379,073	33
Cincinnati	374,570	34
San Antonio	361,265	35
Greenville - Spartanburg - Asheville	331,486	36
Louisville	326,927	37
Norfolk - Portsmouth - Newport News - Hampton	320,022	38
Nashville	310,512	39
Greensboro - Winston-Salem - High Point	305,700	40
Tulsa	301,206	41
Milwaukee	289,451	42
Memphis	285,844	43
Salt Lake City	281,084	44
Dayton	280,059	45
Providence - New Bedford	260,703	46
Little Rock	256,727	47
Knoxville	255,761	48
Jacksonville	253,703	49
Buffalo	247,588	50
Grand Rapids - Kalamazoo - Battle Creek	236,449	51
Austin, Tex	235,635	52
Charleston - Huntington	235,607	53
Mobile - Pensacola	232,752	54
Wichita - Hutchinson	228,176	55
Harrisburg - York - Lancaster - Lebanon	226,702	56
Shreveport - Texarkana	224,583	57
Albuquerque	223,490	58
Richmond	222,474	59
Birmingham	220,678	60
Toledo	204,854	61
Flint - Saginaw - Bay City	204,582	62
Fresno - Visalia	202,228	63
Lexington	190,526	64
Baton Rouge	178,916	65
West Palm Beach	177,968	66
Albany - Schenectady - Troy	174,189	67
Palm Springs	172,161	68
Springfield - Decatur - Champaign	166,311	69
Des Moines	162,445	70
Roanoke - Lynchburg	161,935	71
Omaha	161,534	72
Portland - Poland Spring	160,353	73
Davenport - Rock Island - Moline	153,267	74
Wilkes-Barre - Scranton	152,526	75
Chattanooga	150,059	76
Evansville	149,513	77
Rochester, N.Y	149,101	78
Columbia, S.C	148,392	79
Waco - Temple	145,022	80
South Bend - Elkhart	144,384	81
Paducah - Cape Girardeau - Harrisburg - Marion	144,157	82
Spokane	139,585	83
Savannah	135,561	84
Corpus Christi	132,045	85
Charleston, S.C	131,108	86
Cedar Rapids - Waterloo - Dubuque	130,012	87
Tucson	129,677	88
Syracuse	128,625	89
Bristol - Kingsport - Johnson City	127,763	90
Huntsville - Decatur - Florence	127,411	91
Santa Barbara - Santa Maria - San Luis Obispo	126,459	92
Springfield, Mo	126,429	93
Las Vegas	126,224	94
Green Bay	125,462	95
El Paso	124,486	96
Jackson, Miss	121,883	97
Greenville - New Bern - Washington	121,529	98
Odessa - Midland	121,240	99
Salinas - Monterey	116,875	100

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Top 100 Per Capita Eating Place Markets

1984

By Metro Area

Metro Area Name	Sales per capita	Ranking
Anchorage	1,168	1
San Francisco	1,105	2
Honolulu	993	3
Odessa	850	4
Atlantic City	847	5
Houma - Thibodaux	801	6
Santa Barbara - Santa Maria - Lompoc	800	7
Anaheim - Santa Ana	792	8
Oklahoma City	738	9
Panama City	773	10
Boston - Lawrence - Salem - Lowell - Brockton	763	11
Lafayette, La	759	12
Midland, Tex	748	13
Seattle	739	14
Dallas	725	15
Fort Lauderdale - Hollywood - Pompano Beach	719	16
Bryan - College Station	714	17
Abilene	706	18
Naples	704	19
Portland, Me	693	20
Austin	689	21
San Jose	688	22
Sarasota	687	23
Boulder - Longmont	683	24
Orlando	681	25
Reno	677	26
Amarillo	675	27
Denver	674	28
San Angelo	666	29
Houston	663	30
New Orleans	662	31
West Palm Beach - Boca Raton - Delray Beach	659	32
Burlington, Vt	657	33
Knoxville	651	34
Washington	648	35
Wilmington, N.C	644	36
Las Vegas	642	37
Los Angeles - Long Beach	634	38
Fort Worth - Arlington	625	39
Atlanta	619	40
Bridgeport - Stamford - Norwalk - Danbury	615	41
Portland, Ore	613	42
Daytona Beach	611	43
Fort Walton Beach	610	44
Enid	609	45
Longview - Marshall	609	45
Lubbock	605	47
Bellingham	598	48
Lexington-Fayette	597	49
Manchester - Nashua	595	50
San Diego	595	50
Savannah	595	50
Tulsa	595	50
Galveston - Texas City	588	54
Madison	588	54
Sacramento	588	54
San Antonio	588	54
Bradenton	587	58
Wichita Falls	587	58
Santa Cruz	586	60
Hartford - New Britain - Middletown - Bristol	584	61
Portsmouth - Dover - Rochester	580	62
Rapid City	580	62
Salinas - Seaside - Monterey	580	62
Billings	578	65
Santa Fe	577	66
Pittsfield	572	67
Albuquerque	571	68
Cheyenne	569	69
Miami - Hialeah	567	70
Asheville	565	71
Burlington, N.C	564	72
Gainesville	564	72
Bergen - Passaic	562	74
Indianapolis	562	74
Oakland	562	74
Muncie	561	77
Toledo	561	77
Fort Myers - Cape Coral	560	79
Champaign - Urbana - Rantoul	555	80
Corpus Christi	554	81
New York	554	81
Spokane	554	81
Tampa - St. Petersburg - Clearwater	550	84
Springfield, Mass	548	85
Kalamazoo	547	86
Owensboro	546	87
Phoenix	545	88
Raleigh - Durham	545	88
Boise	539	90
Terre Haute	537	91
Topeka	535	92
New Haven - Waterbury - Meriden	533	93
Kansas City	532	94
Bakersfield	531	95
Casper	530	96
Colorado Springs	530	96
Rochester, Minn	530	96
Lafayette - West Lafayette	529	99
Biloxi - Gulfport	528	100

By ADI

ADI Name	Sales per capita	Ranking
Salisbury	776	1
Santa Barbara - Santa Maria - San Luis Obispo	771	2
Flagstaff	744	3
San Francisco	742	4
Boston	712	5
Sarasota	687	6
Odessa - Midland	657	7
Oklahoma City	649	8
Austin, Tex	644	9
Denver	644	9
Los Angeles	639	11
Miami	634	12
New Orleans	630	13
Las Vegas	629	14
Dallas - Ft. Worth	626	15
Seattle - Tacoma	622	16
Houston	614	17
Washington, D.C	597	18
San Diego	595	19
West Palm Beach	591	20
San Angelo	588	21
Reno	585	22
Orlando - Daytona Beach - Melbourne	574	23
Salinas - Monterey	568	24
Charlottesville	564	25
Biloxi - Gulfport - Pascagoula	560	26
Ft. Myers - Naples	556	27
Springfield, Mass	548	28
Atlanta	545	29
Hartford - New Haven	543	30
Portland, Ore	541	31
Panama City	534	32
Bakersfield	531	33
Cheyenne	529	34
Florence, S.C	529	34
Gainesville	525	36
Palm Springs	525	36
Portland - Poland Spring	518	38
Sacramento - Stockton	517	39
Victoria	517	39
Tampa - St. Petersburg	514	41
San Antonio	512	42
Madison	511	43
Corpus Christi	507	44
Eureka	506	45
Grand Junction	506	45
New York	503	47
Lafayette, Ind	499	48
Phoenix	499	48
Providence - New Bedford	488	50
Tulsa	488	50
Amarillo	486	52
Helena	485	53
Waco - Temple	485	53
Baltimore	484	55
Indianapolis	484	55
Lima	482	57
Abilene - Sweetwater	481	58
Kansas City	481	58
Bend	476	60
Billings - Hardin	476	60
Casper - Riverton	473	62
Toledo	473	62
Rochester, N.Y	472	64
Chicago	466	65
Glendive	465	66
Colorado Springs - Pueblo	463	67
Bowling Green	461	68
Jacksonville	459	69
Laredo	459	69
Minneapolis - St. Paul	459	69
Lafayette, La	457	72
Roswell	457	72
Wichita Falls - Lawton	457	72
Greensboro - Winston-Salem - High Point	456	75
Knoxville	455	76
Cincinnati	454	77
Columbus, Ohio	453	78
Eugene	451	79
Philadelphia	451	79
Baton Rouge	447	81
Norfolk - Portsmouth - Newport News - Hampton	446	82
Detroit	445	83
St. Louis	445	83
Albuquerque	440	85
Cleveland	440	85
Lubbock	440	85
Burlington - Plattsburgh	439	88
Charleston, S.C	438	89
Tucson	435	90
Chico - Redding	431	91
Savannah	431	91
Topeka	431	91
Parkersburg	430	94
Milwaukee	429	95
Medford	427	96
Boise	424	97
Butte	423	98
Yakima	423	98
Beaumont - Port Arthur	421	100

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Top 100 Per Capita Restaurant Markets

1984

By Metro Area

Metro Area Name	Sales per capita	Ranking
San Francisco	687	1
Honolulu	527	2
Santa Barbara - Santa Maria - Lompoc	520	3
Atlantic City	495	4
Anchorage	489	5
Sarasota	456	6
Anaheim - Santa Ana	452	7
Boston - Lawrence - Salem - Lowell - Brockton	433	8
West Palm Beach - Boca Raton - Delray Beach	433	8
Fort Lauderdale - Hollywood - Pompano Beach	432	10
Seattle	418	11
Portland, Me	414	12
Panama City	403	13
Burlington, Vt	401	14
Boulder - Longmont	399	15
Reno	389	16
Salinas - Seaside - Monterey	382	17
Denver	373	18
Bridgeport - Stamford - Norwalk - Danbury	365	19
Portsmouth - Dover - Rochester	359	20
Pittsfield	358	21
Naples	355	22
San Jose	355	22
Los Angeles - Long Beach	353	24
Orlando	353	24
Manchester - Nashua	350	26
Portland, Ore	347	27
Odessa	346	28
Madison	345	29
Rapid City	341	30
Bellingham	340	31
Fort Myers - Cape Coral	340	31
San Diego	332	33
Billings	331	34
Springfield, Mass	325	35
Las Vegas	321	36
Fort Walton Beach	318	37
New York	318	37
Bergen - Passaic	314	39
Dallas	310	40
Daytona Beach	307	41
Santa Cruz	307	41
Washington	307	41
Bradenton	306	44
Rochester, Minn	305	45
Midland, Tex	304	46
New London - Norwich	302	47
Oklahoma City	302	47
Austin	300	49
Sacramento	299	50
Hartford - New Britain - Middletown - Bristol	298	51
Oakland	298	51
Houston	296	53
Minneapolis - St Paul	295	54
New Orleans	295	54
Worcester - Fitchburg - Leominster	295	54
New Haven - Waterbury - Meriden	294	57
Gainesville	293	58
Miami - Hialeah	293	58
Spokane	293	58
Cheyenne	292	61
Olympia	291	62
Bryan - College Station	290	63
Abilene	287	64
Phoenix	286	65
Fort Wayne	284	66
La Crosse	284	66
Toledo	284	66
Boise	282	69
Green Bay	281	70
Knoxville	277	71
Santa Rosa - Petaluma	276	72
Tampa - St Petersburg - Clearwater	276	72
Amarillo	274	74
Casper	274	74
Champaign - Urbana - Rantoul	274	74
Lafayette, La	274	74
Tacoma	274	74
Vallejo - Fairfield - Napa	274	74
Sioux Falls	273	80
Lancaster	272	81
Monmouth - Ocean	272	81
Tallahassee	272	81
Fargo - Moorhead	271	84
San Angelo	271	84
Santa Fe	268	86
Bakersfield	267	87
South Bend - Mishawaka	267	87
Albuquerque	264	89
Great Falls	262	90
Providence - Pawtucket - Woonsocket	261	91
Chicago	259	92
Ann Arbor	257	93
Kalamazoo	257	93
Nassau - Suffolk	257	93
Akron	256	96
Fort Collins - Loveland	253	97
Reading	253	97
Bismarck	252	99
Bloomington - Normal	252	99
Chico	252	99
Duluth	252	99
Rochester, N Y	252	99

By ADI

ADI Name	Sales per capita	Ranking
Santa Barbara - Santa Maria - San Luis Obispo	487	1
Sarasota	456	2
San Francisco	421	3
Boston	416	4
Salisbury	409	5
Flagstaff	405	6
West Palm Beach	369	7
Denver	365	8
Seattle - Tacoma	355	9
Los Angeles	354	10
Miami	351	11
Salinas - Monterey	343	12
San Diego	332	13
Reno	331	14
Springfield, Mass	325	15
Grand Junction	321	16
Las Vegas	315	17
Ft Myers - Naples	312	18
Madison	308	19
Portland, Ore	299	20
Eureka	298	21
Portland - Poland Spring	296	22
Orlando - Daytona Beach - Melbourne	292	23
Hartford - New Haven	291	24
Palm Springs	289	25
Helena	287	26
New York	282	27
Washington, D C	278	28
Austin, Tex	277	29
Panama City	277	29
Glendive	276	31
Billings - Hardin	274	32
Gainesville	274	32
Providence - New Bedford	272	34
Cheyenne	271	35
Houston	269	36
Bakersfield	267	37
Minneapolis - St Paul	264	38
Odessa - Midland	264	38
Phoenix	263	40
Sacramento - Stockton	262	41
Burlington - Plattsburgh	261	42
Bend	260	43
Dallas - Ft Worth	258	44
Rochester, N Y	258	44
New Orleans	255	46
Tampa - St Petersburg	254	47
Butte	252	48
Casper - Riverton	246	49
Oklahoma City	246	49
Milwaukee	243	51
Yakima	243	51
Chico - Redding	242	53
Mankato	240	54
Chicago	239	55
Charlottesville	238	56
San Angelo	238	56
Medford	235	58
Albany - Schenectady - Troy	232	59
Toledo	232	59
Missoula	231	61
Spokane	230	62
Philadelphia	228	63
Boise	225	64
Rapid City	225	64
Colorado Springs - Pueblo	224	66
Eugene	224	66
Detroit	223	68
Duluth - Superior	221	69
El Centro - Yuma	221	69
La Crosse - Eau Claire	220	71
Cleveland	219	72
Lima	219	72
Traverse City - Cadillac	219	72
Florence, S C	218	75
Great Falls	218	75
Harrisburg - York - Lancaster - Lebanon	216	77
Ft Wayne	213	78
Tucson	213	78
Cincinnati	212	80
Kansas City	21[illegible]	80
Roswell	212	80
Syracuse	210	83
Victoria	210	83
Atlanta	208	85
Green Bay	208	85
Albuquerque	207	87
Lafayette, Ind	207	87
Bangor	206	89
Corpus Christi	205	90
Baltimore	204	91
Omaha	201	92
Wausau - Rhinelander	199	93
San Antonio	198	94
Biloxi - Gulfport - Pascagoula	197	95
Buffalo	197	95
Amarillo	196	97
Norfolk - Portsmouth - Newport News - Hampton	196	[illegible]
Waco - Temple	196	97
Rockford	195	10[illegible]
South Bend - Elkhart	195	100

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Top 100 Per Capita Fast Food Markets

1984

By Metro Area

Metro Area Name	Sales per capita	Ranking
Anchorage	389	1
Odessa	384	2
Oklahoma City	375	3
Honolulu	354	4
Wilmington, N C	347	5
Lafayette, La	338	6
Midland, Tex	338	6
Houma - Thibodaux	329	8
Bryan - College Station	323	9
Abilene	319	10
Savannah	313	11
Owensboro	312	12
Lexington-Fayette	311	13
Knoxville	308	14
Enid	307	15
Austin	306	16
Amarillo	305	17
Asheville	305	17
Burlington, N C	304	19
Tulsa	304	19
Dallas	302	21
San Angelo	301	22
Naples	299	23
Atlanta	298	24
Fort Worth - Arlington	293	25
Panama City	290	26
Biloxi - Gulfport	289	27
Fayetteville - Springdale	287	28
Anaheim - Santa Ana	286	29
San Jose	276	30
Longview - Marshall	275	31
Topeka	275	31
Louisville	274	33
Lubbock	274	33
Raleigh - Durham	273	35
Muncie	272	36
Baton Rouge	270	37
Indianapolis	269	38
Atlantic City	268	39
San Francisco	268	39
Galveston - Texas City	266	41
Houston	265	41
Corpus Christi	265	43
Orlando	265	43
Santa Fe	265	43
Wichita Falls	265	43
Evansville	263	47
Charlotte - Gastonia - Rock Hill	261	48
New Orleans	261	48
Terre Haute	260	50
Little Rock - North Little Rock	257	51
San Antonio	257	51
Lafayette - West Lafayette	256	53
Columbia, S C	254	54
Columbus, Ohio	254	54
Greensboro - Winston-Salem - High Point	254	54
Huntsville	252	57
Kokomo	252	57
Lawton	252	57
Sacramento	252	57
Jacksonville, Fla	251	61
Jackson, Tenn	250	62
Lawrence, Kans	248	63
Fort Smith	247	64
Kansas City	247	64
Bloomington, Ind	246	66
Santa Cruz	246	66
Shreveport	245	68
Dothan	244	69
Athens	241	70
Elkhart - Goshen	241	70
Reno	240	72
Gary - Hammond	239	73
Greenville - Spartanburg	239	73
Springfield, Mo	239	73
Albuquerque	238	76
Santa Barbara - Santa Maria - Lompoc	238	76
Waco	238	76
Huntington - Ashland	237	79
Hickory	235	80
Texarkana	235	80
Daytona Beach	234	82
Portland, Me	234	82
Seattle	234	82
Victoria	234	82
Washington	234	82
Bakersfield	233	87
Colorado Springs	233	87
St. Louis	233	87
Dayton - Springfield	232	90
Wichita	232	90
Boulder - Longmont	231	92
Charleston, S C	231	92
Las Vegas	231	92
Fort Walton Beach	229	95
Eugene - Springfield	228	96
Pensacola	228	96
Riverside - San Bernardino	228	96
Champaign - Urbana - Rantoul	227	99
Cheyenne	227	99
Memphis	227	99
Albany, Ga	226	102
Kalamazoo	226	102

By ADI

ADI Name	Sales per capita	Ranking
Salisbury	321	1
Oklahoma City	316	2
Odessa - Midland	311	3
Biloxi - Gulfport - Pascagoula	307	4
Austin, Tex	294	5
Bowling Green	291	6
Flagstaff	289	7
Dallas - Ft. Worth	277	8
Atlanta	271	9
San Angelo	271	9
Charlottesville	262	11
Houston	255	12
Corpus Christi	251	13
Florence, S C	251	13
New Orleans	251	13
Santa Barbara - Santa Maria - San Luis Obispo	250	16
Tulsa	250	16
San Francisco	247	18
Lafayette, Ind	242	19
Parkersburg	239	20
Amarillo	236	21
Indianapolis	236	21
Abilene - Sweetwater	235	23
Baton Rouge	234	24
Victoria	234	24
Bakersfield	233	26
Louisville	232	27
San Antonio	231	28
Charlotte	230	29
Greensboro - Winston-Salem - High Point	230	29
Los Angeles	230	29
Jacksonville	229	32
Savannah	228	33
Sacramento - Stockton	227	34
Las Vegas	226	35
Wichita Falls - Lawton	226	35
Kansas City	225	37
Knoxville	224	38
Orlando - Daytona Beach - Melbourne	224	38
Topeka	224	38
Raleigh - Durham	223	41
Waco - Temple	223	41
Washington, D C	223	41
Columbus, Ohio	222	44
Ft. Smith	221	45
Lima	220	46
Palm Springs	219	47
Charleston, S C	217	48
Lexington	215	49
San Diego	215	49
St. Louis	212	51
Cheyenne	211	52
Norfolk - Portsmouth - Newport News - Hampton	211	52
Little Rock	210	54
Roswell	210	54
Ft. Myers - Naples	209	56
Laredo	209	56
Lubbock	209	56
Reno	209	56
Evansville	208	60
Seattle - Tacoma	208	60
Wichita - Hutchinson	208	60
Denver	207	63
Jonesboro	207	63
Baltimore	206	65
Miami	206	65
Dayton	205	67
Panama City	205	67
Salinas - Monterey	205	67
Tampa - St. Petersburg	204	70
Wilmington	204	70
Greenville - Spartanburg - Asheville	203	72
Tuscaloosa	202	73
Portland, Ore	200	74
Eugene	199	75
Gainesville	199	75
Macon	198	77
Boston	197	78
Lafayette, La	197	78
Cincinnati	196	80
Tyler	196	80
Mobile - Pensacola	195	82
Casper - Riverton	194	83
Jackson, Tenn	194	83
Toledo	193	85
Beaumont - Port Arthur	192	86
Columbia, S C	192	86
Eureka	192	86
Richmond	192	86
Albuquerque	189	90
Bend	188	91
Greenville - New Bern - Washington	187	92
Harrisonburg	187	92
Colorado Springs - Pueblo	186	94
El Paso	185	95
Hartford - New Haven	184	96
Portland - Poland Spring	184	96
South Bend - Elkhart	184	96
Zanesville	184	96
Chattanooga	182	100
Cleveland	182	100
Phoenix	182	100
Shreveport - Texarkana	182	100

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Top 100 RAI Markets

By Metro Area 1984 By ADI

Metro Area Name	RAI	Ranking
Honolulu	230	1
Panama City	188	2
San Francisco	178	3
Anchorage	176	4
Houma - Thibodaux	154	5
Boston - Lawrence - Salem - Lowell - Brockton	150	6
Kalamazoo	150	6
Salinas - Seaside - Monterey	145	8
Anaheim - Santa Ana	144	9
Green Bay	142	10
Lafayette, La	142	10
Oklahoma City	142	10
New York	140	13
Champaign - Urbana - Rantoul	139	14
Fort Walton Beach	139	14
Fort Lauderdale - Hollywood - Pompano Beach	138	16
Austin	137	17
Portland, Ore	137	17
Dallas	136	19
Ann Arbor	135	20
Madison	134	21
Seattle	133	22
Atlantic City	132	23
Atlanta	131	24
Lafayette - West Lafayette	131	24
San Diego	130	26
Orlando	129	27
Santa Barbara - Santa Maria - Lompoc	129	27
San Jose	128	29
Savannah	127	30
Cheyenne	123	31
Indianapolis	123	31
Lubbock	123	31
Amarillo	122	34
Bloomington - Normal	122	34
Chicago	122	34
Los Angeles - Long Beach	122	34
New Orleans	122	34
Odessa	122	34
Washington	122	34
Bryan - College Station	121	41
Wichita Falls	121	41
Abilene	120	43
Fargo - Moorhead	120	43
Fort Smith	120	43
Miami - Hialeah	120	43
Columbia, S.C.	119	47
Houston	119	47
Salem, Ore	119	47
San Antonio	119	47
Bloomington, Ind	118	51
Killeen - Temple	117	52
Lexington-Fayette	117	52
Sarasota	117	52
Tulsa	117	52
Biloxi - Gulfport	116	56
Grand Rapids	116	56
State College	116	56
Jacksonville, Fla	115	59
Muncie	115	59
Norfolk - Virginia Beach - Newport News	115	59
Wilmington, N.C.	115	59
San Angelo	114	63
Worcester - Fitchburg - Leominster	114	63
Bellingham	113	65
Bismarck	113	65
Burlington, Vt	113	65
Colorado Springs	113	65
Denver	113	65
El Paso	113	65
Fayetteville - Springdale	113	65
Tacoma	113	65
Battle Creek	112	73
Eugene - Springfield	112	73
Fort Worth - Arlington	112	73
Hartford - New Britain - Middletown - Bristol	112	73
Lawrence, Kans	112	73
Lincoln	112	73
Monroe	112	73
Fort Wayne	111	80
Sacramento	111	80
Tallahassee	111	80
West Palm Beach - Boca Raton - Delray Beach	111	80
Albuquerque	110	84
Daytona Beach	110	84
Enid	110	84
Greensboro - Winston-Salem - High Point	110	84
Melbourne - Titusville - Palm Bay	110	84
Santa Fe	109	89
South Bend - Mishawaka	109	89
Columbus, Ohio	108	91
Flint	108	91
Knoxville	108	91
Lake County, Ill	108	91
Little Rock - North Little Rock	108	91
New London - Norwich	108	91
Raleigh - Durham	108	91
Santa Cruz	108	91
Boise	107	99
Bradenton	107	99
Lawton	107	99
Spokane	107	99
Springfield, Ill	107	99

ADI Name	RAI	Ranking
Flagstaff	143	1
Salisbury	138	2
Boston	135	3
Panama City	131	4
San Francisco	131	4
San Diego	130	6
Santa Barbara - Santa Maria - San Luis Obispo	130	6
Biloxi - Gulfport - Pascagoula	128	8
Miami	128	8
Austin, Tex	127	10
Lafayette, Ind	124	11
Portland, Ore	124	11
Salinas - Monterey	124	11
Los Angeles	123	14
Cheyenne	121	15
Dallas - Ft. Worth	120	16
Atlanta	119	17
New Orleans	119	17
Oklahoma City	118	19
Seattle - Tacoma	118	19
Sarasota	117	21
Washington, D.C.	116	22
Chicago	115	23
Madison	115	23
Orlando - Daytona Beach - Melbourne	112	25
Houston	111	26
Denver	109	27
Norfolk - Portsmouth - Newport News - Hampton	109	27
El Paso	108	29
Indianapolis	108	29
Florence, S.C.	107	31
Waco - Temple	106	32
Ft. Smith	105	33
New York	105	33
Hartford - New Haven	104	35
San Angelo	104	35
San Antonio	104	35
Tulsa	104	35
Baltimore	103	39
Detroit	103	39
Jacksonville	103	39
Lima	103	39
Springfield, Mass	103	39
Columbia, S.C.	101	44
Eugene	101	44
Grand Rapids - Kalamazoo - Battle Creek	101	44
Lansing	101	44
West Palm Beach	101	44
Columbus, Ohio	100	49
Las Vegas	100	49
Sacramento - Stockton	100	49
Bakersfield	99	52
Gainesville	99	52
Wichita Falls - Lawton	99	52
Greensboro - Winston-Salem - High Point	98	55
Savannah	98	55
Charleston, S.C.	97	57
Cincinnati	97	57
Kansas City	97	57
Milwaukee	97	57
Minneapolis - St. Paul	97	57
Odessa - Midland	97	57
Toledo	97	57
Bend	96	64
Colorado Springs - Pueblo	96	64
Ft. Wayne	96	64
Lubbock	96	64
Rochester, N.Y.	96	64
Green Bay	95	69
Palm Springs	95	69
South Bend - Elkhart	95	69
Springfield - Decatur - Champaign	95	69
Tampa - St. Petersburg	95	69
Bowling Green	94	74
Jonesboro	94	74
Lafayette, La	94	74
Peoria	94	74
Philadelphia	94	74
Medford	93	79
North Platte	93	79
Abilene - Sweetwater	92	81
Amarillo	92	81
Louisville	92	81
Parkersburg	92	81
Tallahassee - Thomasville	92	81
Dayton	91	86
Flint - Saginaw - Bay City	91	86
Lincoln - Hastings - Kearney	91	86
Little Rock	91	86
Providence - New Bedford	91	86
Raleigh - Durham	91	86
Albuquerque	90	92
Baton Rouge	90	92
Cleveland	90	92
Topeka	90	92
Tucson	90	92
Corpus Christi	89	97
Ft. Myers - Naples	89	97
Jackson, Tenn	89	97
La Crosse - Eau Claire	89	97
Rockford	89	97
Tyler	89	97

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Top 100 RGI Markets

By Metro Area **1984** **By ADI**

Metro Area Name	RGI	Ranking
Las Vegas	644	1
Reno	368	2
Atlantic City	226	3
Aurora - Elgin	173	4
Rochester, Minn	170	5
Orlando	165	6
Honolulu	162	7
Anchorage	143	8
Washington	142	9
Miami - Hialeah	138	10
Bismarck	136	11
Casper	133	12
Huntsville	131	13
New Orleans	131	13
Iowa City	129	15
Minneapolis - St. Paul	129	15
Houston	127	17
Dallas	126	18
Pascagoula	126	18
Baton Rouge	122	20
Charleston, S.C	122	20
Newark	122	20
Trenton	122	20
Brazoria	121	24
Ann Arbor	120	25
Atlanta	120	25
Cheyenne	120	25
Jackson, Miss	119	28
Grand Rapids	117	29
Lake Charles	117	29
Beaver County, Pa	116	31
Montgomery	116	31
Denver	115	33
Florence, S.C	115	33
Nashville	115	33
Boston - Lawrence - Salem - Lowell - Brockton	114	36
Lancaster	114	36
New York	114	36
Philadelphia	114	36
San Jose	114	36
West Palm Beach - Boca Raton - Delray Beach	114	36
Albany, Ga	113	42
Columbia, Mo	113	42
Louisville	113	42
Phoenix	113	42
Salt Lake City - Ogden	113	42
Harrisburg - Lebanon - Carlisle	112	47
Kansas City	112	47
Memphis	112	47
Middlesex - Somerset - Hunterdon	112	47
Pensacola	112	47
Sioux Falls	112	47
Baltimore	111	53
Lafayette, La	111	53
Burlington, Vt	110	55
Charlottesville	110	55
Chicago	110	55
Indianapolis	110	55
Jersey City	110	55
Knoxville	110	55
Lexington-Fayette	110	55
Panama City	110	55
Richland - Kennewick - Pasco	110	55
Saginaw - Bay City - Midland	110	55
Charlotte - Gastonia - Rock Hill	109	65
Houma - Thibodaux	109	65
Macon - Warner Robins	109	65
Raleigh - Durham	109	65
Roanoke	109	65
Beaumont - Port Arthur	108	70
Daytona Beach	108	70
Grand Forks	108	70
Hickory	108	70
Jacksonville, Fla	108	70
Lansing - East Lansing	108	70
San Francisco	108	70
Tampa - St. Petersburg - Clearwater	108	70
Anniston	107	78
Bergen - Passaic	106	79
Fort Lauderdale - Hollywood - Pompano Beach	106	79
Galveston - Texas City	106	79
Los Angeles - Long Beach	106	79
Manchester - Nashua	106	79
Shreveport	106	79
Wilmington, Del	106	79
Birmingham	105	86
Chattanooga	105	86
Fargo - Moorhead	105	86
Fort Worth - Arlington	105	86
Norfolk - Virginia Beach - Newport News	105	86
Omaha	105	86
Augusta	104	92
Columbia, S.C	104	92
Erie	104	92
Lafayette - West Lafayette	104	92
Little Rock - North Little Rock	104	92
St. Louis	104	92
Flint	103	98
Hagerstown	103	98
Mobile	103	98
San Antonio	103	98
San Diego	103	98
Savannah	103	98

ADI Name	RGI	Ranking
Las Vegas	631	1
Reno	388	2
Washington, D.C	132	3
Orlando - Daytona Beach - Melbourne	127	4
Florence, S.C	125	5
New Orleans	124	6
Baton Rouge	123	7
Miami	123	7
Houston	120	9
Charleston, S.C	117	10
Lake Charles	117	10
Philadelphia	117	10
Atlanta	113	13
Savannah	113	13
Cheyenne	112	15
Dallas - Ft. Worth	112	15
Jackson, Miss	111	17
Montgomery	111	17
Jacksonville	110	19
Macon	110	19
Minneapolis - St. Paul	110	19
Baltimore	108	22
Salt Lake City	108	22
Anniston	107	24
Casper - Riverton	107	24
Charlottesville	107	24
Chicago	107	24
Harrisburg - York - Lancaster - Lebanon	107	24
Louisville	107	24
New York	107	24
Albany, Ga	106	31
Boston	106	31
Flagstaff	106	31
Mobile - Pensacola	106	31
Panama City	106	31
Phoenix	106	31
West Palm Beach	106	31
Bluefield - Beckley - Oak Hill	105	38
Columbia, S.C	105	38
Roanoke - Lynchburg	105	38
Beaumont - Port Arthur	104	41
Charlotte	104	41
Huntsville - Decatur - Florence	104	41
Knoxville	104	41
Tampa - St. Petersburg	104	41
Augusta	103	46
Chattanooga	103	46
Columbus - Tupelo	103	46
Detroit	103	46
Hagerstown	103	46
Kansas City	103	46
San Diego	103	46
Tallahassee - Thomasville	103	46
Lafayette, Ind	102	54
Lansing	102	54
Los Angeles	102	54
Nashville	102	54
Norfolk - Portsmouth - Newport News - Hampton	102	54
Rochester, N.Y	102	54
Birmingham	101	60
Lexington	101	60
Memphis	101	60
San Francisco	101	60
Denver	100	64
Lafayette, La	100	64
Meridian	100	64
Raleigh - Durham	100	64
Richmond	100	64
Columbus, Ga	99	69
El Paso	99	69
Greensboro - Winston-Salem - High Point	99	69
Biloxi - Gulfport - Pascagoula	98	72
Tuscaloosa	98	72
Cincinnati	97	74
St. Louis	97	74
Charleston - Huntington	96	76
Helena	96	76
Milwaukee	96	76
Grand Rapids - Kalamazoo - Battle Creek	95	79
Laurel - Hattiesburg	95	79
Pittsburgh	95	79
Rapid City	95	79
Cleveland	94	83
Erie	94	83
Flint - Saginaw - Bay City	94	83
Monroe - El Dorado	94	83
North Platte	94	83
Palm Springs	94	83
Dothan	93	89
Indianapolis	93	89
Parkersburg	93	89
San Antonio	93	89
Binghamton	92	93
Burlington - Plattsburgh	92	93
Columbus, Ohio	92	93
Presque Isle	92	93
Shreveport - Texarkana	92	93
Alexandria, La	91	98
Minot - Bismarck - Dickinson	91	98
Seattle - Tacoma	91	98
Springfield, Mass	91	98
Tucson	91	98